



SATERN

System for Administration, Training, and Educational Resources for NASA

Rules and Process Guide for Administrators

(Version 2.0)
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Document Revision History

Chapter	Date	Revision Description
Global	9/22/2008	Section added: Deactivation of Agency Mandatory Courses
Global	9/22/2008	Section added: Assignment Types for Federally Mandated Training
Scheduling	9/22/2008	Section added: Scheduled Offering, Calculating Per Participant Costs
Learning Management	9/22/2008	Updated section: Agency-wide Courses
System Administration	9/22/2008	Updated section: Granting Discipline Administrator Access
Appendix H	9/22/2008	Section Added: User Reference Code Values (formerly Addendum)
Upgrade Changes	12/07/2009	Business Rules sub-team report (11/10/2009)





Introduction

The implementation of NASA's e-Training Learning Management System (LMS), the System for Administration, Training, and Educational Resources for NASA (SATERN), changed current training business processes, as well as systems that were used for training registration, enrollment and delivery. It continues to improve Agency services and save taxpayer dollars, reduce redundancies through the consolidation of multiple learning systems, contribute to improved consistency and efficiency in training operations, and support the development of NASA employees.

This document identifies areas where system functionality cannot enforce the Agency-defined usage of the system and provides guidance to enable compliance with Agency-defined methods and procedures. It is the result of the SATERN Business Rules sub-team, comprised of Discipline and Center Representatives, whose job it is to document agreed-upon business rules for the SATERN LMS rollout. This Guidebook contains the rules that the sub-team recommended, the Transition Teams endorsed, and SATERN Governance approved. It is a living document that will adjust to the changing needs of NASA.

Setting the Context

The SATERN e-Training effort is one of the President's Management Council approved e-Government initiatives that supports the President's Management Agenda (PMA) for improving the Government's responsiveness to citizens and efficiency of operations. The vision of the initiative was to create a premier e-training environment that supports the development of the NASA workforce through simplified and one-stop access to high quality training products and processes to support learning and development.

SATERN provides Users with desktop access to training information and courses. Through the implementation of a centralized LMS, the training community within NASA has new tools, functionality and capabilities for training administration and delivery. Three legacy systems were transitioned to the e-Training LMS:

- AdminSTAR—training administration system used by all Center Training Offices.
- NORS—(NASA Online Registration System) allowed students to register online for courses and was integrated with AdminSTAR, but subsequently only used at MSFC and KSC.
- SOLAR—(Site for Online Learning and Resources) online custom content courseware system that was used throughout NASA.

For the e-Training transition, NASA selected the Plateau Learning Management System software, called SATERN, which is a comprehensive system that enables process standardization and provides timely, up-to-date information. Centers are able to identify training requirements, deploy learning and track its completion. SATERN also allows for tracking of certifications, assessment of competencies, online enrollment and testing, course Catalogs and facility management.



Version 2.0

This is a replacement of, not a supplement to, all previous versions of the *SATERN Rules and Process Guide for Administrators*, and incorporates all changes made to the point of the introduction of the Plateau version 5.8.5.

Business Rules Defined

A business rule is defined as guidance that there is an obligation concerning conduct, action, practice or procedure within a particular activity. Business rules are used to govern activity outside the system and / or describe standard Agency practice when using the system.

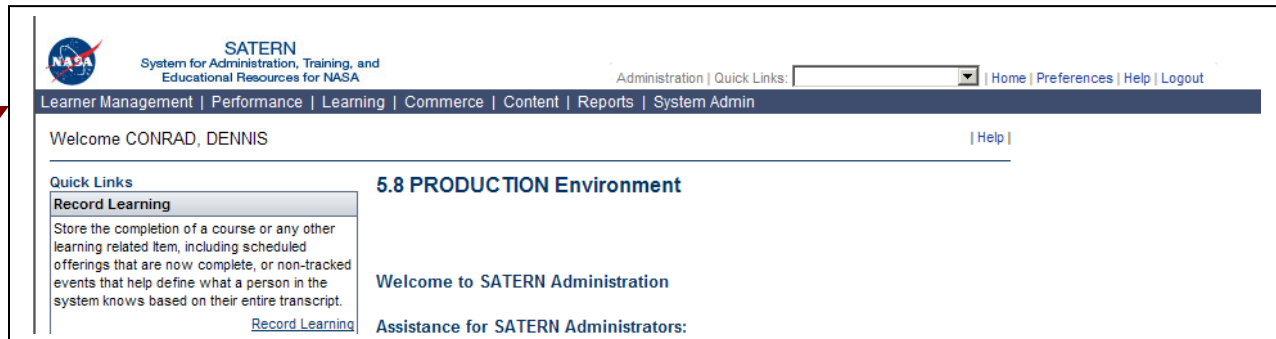
Rules are important because the NASA SATERN Administrative community is self-governing and ultimately, the efficiency and integrity of SATERN is the responsibility of Center and Discipline SATERN Administrators.

How to Use this Document

The Process Guidebook is meant as a reference that enables SATERN Administrators to understand and easily identify specific guidance that is required by NASA. The document is arranged by functional subject area, based on the structure in SATERN. Administrators can refer to the table of contents, the list of rules in each section or to the index at the end to easily find the information or topics. Process flows and screen shots are provided where applicable to describe functionality. This document is not a training guide. It is assumed that Administrators using this guidebook have been trained on SATERN, are familiar with current Center processes, and are comfortable performing the functions in the system for which they are authorized.

SATERN Business Rules and Process Guidance

With the exception of the Global section below which applies to the entire system, the sections of the document follow the **top navigation** found in SATERN so Administrators can refer to the guidebook alongside the application, as needed.



Each **situation** is followed by the NASA **Business Rule, Process or Guidance**.

Global

Global rules for SATERN apply to the system as a whole.

NASA Official Use Only

Situation: NASA systems are for the official use of NASA employees and contractors. SATERN is the Agency system to record and manage NASA Training and Development events. While some training events could be considered important to a User, it is important that the system is used for official use only.

Rule: Record only training events that were paid for by NASA or were attended during NASA working hours.

Data Entry and Data Consistency

Situation: SATERN does not fully enforce data consistency in free-form fields; other fields use drop-down reference tables where only pre-defined choices are allowed. Ensuring that NASA data is clean and consistent has many benefits: Users see an interface that is uniform and easily readable and reports contain clean and complete data. Administrators must take responsibility for adhering to detailed data entry rules.



Rule: Administrators shall use the following naming conventions when entering data:

1. IDs (except User-ID) can consist of letters and numbers and shall be entered in upper case with dashes where spaces would be (e.g., ARC-SAFETY). All Domain specific IDs shall be prefixed with the Center's or Discipline's acronym (i.e., GRC-, JSC-, KSC-, ITS-, SMA-, HQ-, AG-, etc). If there is a need to have additional spaces in the ID, only dashes should be used (e.g. ARC-SAFETY-FIRE).
 - a. Catalog ID
 - b. Content Package ID
 - c. Content Object ID
 - d. Curriculum ID
 - e. Domain ID
 - f. Equipment ID
 - g. Exam ID
 - h. Item ID
 - i. Location ID
 - j. Objective ID
 - k. Question ID
 - l. Process ID
 - m. Survey ID
 - n. Facility ID
 - o. Material ID
 - p. Assignment Profile ID
 - q. Document ID
 - r. Instructor ID
 - s. Class ID
 - t. Community ID
2. User profile data shall be entered in upper case letters.
3. The following data shall be entered using all upper case letters:
 - a. Course Titles
 - b. User Defined Fields (custom fields)
 - c. User and Instructor Names and Titles
4. When setting up facilities and locations, use upper case with dashes in the following format: CENTER-FACILITY-LOCATION.
Facility means building and Location means room number.
(Example: GRC-B15-R101).
5. All Descriptions shall be entered using a combination of upper and lower case letters.



Deactivation of Agency Mandatory Courses

Situation: Agency mandatory courses (e.g., *No Fear*) are often automatically assigned to new hires by Centers. If a course is deactivated, users are unable to access the course.

Therefore, the following business rule ensures that Center Administrators receive a communication before the course is deactivated.

Rule: When a course owner decides to inactivate an Agency mandatory online course within SATERN, the following process must be followed, unless a deviation is agreed upon by the SATERN Executive Committee (EC) and course owner:

1. The course owner will notify the SATERN Online Training Support Services and the NSSC.
2. The course owner will pick a deactivation date that will be no less than three (3) working days from the date of the communication to the parties listed in step four.
3. If the course owner wants a specific communication to be sent out, they will attach that communication to the message sent to the parties listed in step one.
4. The NSSC will send the communication to those within the Centers that they think need to know within 24 hours of receipt of the communication from the course owner. The course owner will notify any of their key stakeholders that they think need to know.

Assignment Types for Federally Mandated Training

Situation: Without clear guidance to Content Owners and SATERN Administrators regarding when an Item should be assigned an Assignment Type of mandatory, courses are incorrectly classified, leading Users to be misinformed of their training requirements.

Rule: The mandatory Assignment Type should be assigned only to courses that have been approved through the formal federally mandated training vetting process. Approved courses will have been vetted by the Office of Human Capital Management and the Office of General Council, and will meet the Office of Personnel Management definition for federally mandated training. No other courses should be labeled as mandatory. Once an approved course has been given an Assignment Type of mandatory, the SATERN Administrator should not override the Assignment Type without prior approval from the Content Owner.

Mandatory Fields

There are two types of mandatory fields in SATERN. The first type is fields that are required for the software to work properly, for example, every User must have a User ID and a Domain. These fields are identified in the system with red asterisks so that Administrators are reminded to populate those fields.



The second type is fields that NASA has determined are required to achieve usability, data integrity and reporting needs. For example, the Transition Team determined that the Description field in the Item Record be made NASA-mandatory. This is an optional field in SATERN, but it should be made mandatory to ensure that Users have a clear understanding of the resources that are available to them to make informed decisions.

NASA must comply with mandatory OPM requests for training information. In order to satisfy specific reporting requirements mandated by OPM, NASA will use Custom Fields, also referred to as Custom Columns, to capture NASA-specific information that would not otherwise be possible if the SATERN software were implemented without customization.

The SATERN Custom Fields were determined during the configuration sessions for Phase II. Filling in the Custom Fields is mandatory, based on the OPM requirements. The first 16 Custom Fields are required to comply with OPM mandates and the next five vary by Center.

Situation: NASA's compliance, usability, data integrity and reporting needs will not be met if Agency-wide guidelines are not established to provide a common understanding of entering data into SATERN. Administrators must have guidelines on which fields must be populated and what constitutes acceptable entries.

Rule: Administrators shall populate the fields defined as NASA-mandatory fields and enter data outlined in the SATERN Data Definition Table of Acceptable Codes, when appropriate. (Note that the word 'mandatory' implies that the fields are highly recommended and important to NASA in many ways and Administrators should do everything they can to ensure that the fields contain appropriate values.) Zero (0) and None are acceptable values.

Appendix B contains the SATERN Mandatory Fields. This section contains screenshots identifying the mandatory fields, as well as the screens where they are located in the system. This will aid understanding by providing context for the field.

Appendix C contains the SATERN Custom Field Data Definition Table that contains the Custom Field data elements, acceptable codes, descriptions and guidelines.

Document Repository

Situation: Some course owners use SATERN as a document repository to place commonly used documentation in a centralized place where the User can access it. This documentation does not require a certificate and is purely for informational purposes. Setting-up these documents like Online Content allows Users to more easily find and access them.



Rule: Documents must meet the requirements of Section 508 of the Rehabilitation Act. They may be housed on SATERN or on an external Web server. Documents require that a Point of Contact (PoC) be listed in the Item Record, and this PoC will be responsible for making sure that the document remains up-to-date and accessible. Documents need to be in a format that can be opened on all platforms supported by SATERN using software that is freely available. Section 508-conformance must be verified by the SATERN Online Training Services

(<https://www.nssc.nasa.gov/customerservice> > Training > Online Training Services) before posting. Documents must be directly related to an Item, Scheduled Offering, or Online Content, and use the naming convention listed in the Data Entry and Data Consistency section on p. 9. Documents inactive for more than 12 months may be automatically removed from SATERN unless otherwise instructed by owners.

User Management

User Management refers to recording and managing information that pertains to Users, such as profiles and User history.

Note: Users and Learners are used interchangeably to refer to NASA employees using SATERN.

Detailees

Situation: Detailees are employees on assignment away from their home Center who cannot view the Catalog of the Center to which they are detailed. This is a special circumstance that requires definition.

Rule: Since detailees will only have access to their home Center's Catalog, they should work with the Training Administrator where they are detailed in order to find out about classes or a RA-1admin at the host center may create an Assignment Profile to grant access to the host Center's Catalog. See section below on "Assignment Profile for Catalogs" or the Creating an Assignment Profile to Allow a Detailed Employee to View the Host Center Catalog job aid (<https://saterninfo.nasa.gov/> > Resources > For SATERN Administrators > Job Aids

Other Center Training

To maximize civil service employee enrollment in onsite training, Centers frequently open their courses to employees at other Centers. In order to allow Users to use the self-registration features in SATERN to request training at Centers other than their home Center, a specific process must be followed to allow Administrators to efficiently manage enrollment.

Situation: The detailed flow for the Other Center Training process will be detailed in an upcoming job aid on the SATERN Information Web site (<https://saterninfo.nasa.gov/> > Resources > For SATERN Administrators > Job Aids). However, there are two rules,



that when used together, support the process for Other Center Training. The first is to make mandatory the use of a Center prefix for the Facility Description field.

Rule: Administrators shall add the Center prefix to all Center Facility Description fields.

The second is to use a four-step approval process that has been created specifically to address the Other Center Training scenario with the last step in the chain being the Host Center Training Office role.

Rule: Administrators shall use the four-step Supervisor/Training Coordinator/Training Office/Center-specific Host Center Training Office (HCTO) Approval process whenever they wish to make a course available to Users from other Centers. When the Center-Specific HCTO approval role is assigned, the Admin shall assign the “NASA” control Domain to ensure the approver will review requests from Users at all NASA Centers.

Contractor Policy

If approved to do so, contractors are able to utilize SATERN to self-enroll in Scheduled Offerings given the following circumstances:

- There is a contractor sub-Domain at each Center.
- Contractors will be able to launch online courses and enroll in onsite Scheduled Offerings according to their Center policy. [Note: System functionality allows Centers the flexibility to prioritize civil service employees ahead of contractors using the waitlist.]
- Contractors will be given a unique USER-ID written as C-USER ID. As a result, Administrators that wish to control the enrollment of contractors may easily see the difference and take action accordingly.
- To ensure system integrity, the ability for approvers to see that a User is a contractor during the approval process (on the approval screen on the User side) is available.
- Existing active contractor records will come over as part of the normal data migration activities. New contractor accounts will go into a specially created ‘New Account Domain’ so that they can self-register and Administrators can retain control of their Domain assignment. Note: Certifications will continue to be tracked as before. However, contractor companies will not be able to see or manage certifications as before.

Special circumstance: IPAs

Situation: There are a limited number of people working under the Inter-Governmental Personnel Act (IPAs) across the Agency. IPAs are contractors filling a civil service employee role. Like other contractors, IPAs will be able to self-register for Scheduled Offerings. However, in their capacity as a civil service employee equivalent, they should be given the same priority as civil service employees for selected Scheduled Offerings.

Rule: IPAs should work closely with their Center Training Office to ensure the Training Office knows their status, so that their role as a civil service employee is taken into consideration when enrolling in Scheduled Offerings.

Reporting in the Contractor Domain

Contractor Training Coordinators are company representatives that are responsible for the training of the contractors in their company. They are the first line of support for contractor employees and are frequently located in the Training Office at the Center.

Reporting on the Contractor Domain at a Center was initially restricted to the Training Office. There was concern that since a contractor Training Coordinator could see the Training History of any contractor employee, including contractors from other firms, an advantage may be given to that company.

After further review, no conflicts of interest or union issues have been identified. The SATERN Core Team has therefore updated the contractor policy to allow contractor Training Coordinators to have reporting rights into the Center Contractor Domain in order to comply with NASA reporting, certification or training requirements.

Contractor Training Coordinators that wish to have reporting rights in the Contractor Domain at their Center should make their request to the SATERN Administrator Lead (SAL) at their Center or call the SATERN Help Desk at NSSC at 1-877-NSSC-123.

Contractor Process

Based on the policy statement above, each Center can assign the CENTER-VO-11-Contractor role to an Administrator as shown below (GRC-VO-11-Contractor).

The screenshot shows the SATERN System Admin interface. The top navigation bar includes links for Administration, Quick Links, Home, Preferences, Help, and Logout. The main content area is titled 'System Admin' and displays a list of roles under the 'Application Admin' section. A red arrow points to the 'GRC-VO-11-Contractor' role, which is currently assigned to 'GRC View Only (Reports)-Contractor'.

Role	Assigned To	Checkmark
GRC-VO-11-ARMY	GRC View Only (Reports)-ARMY	<input type="checkbox"/>
GRC-VO-11-AS	GRC View Only (Reports)-AS	<input type="checkbox"/>
GRC-VO-11-B	GRC View Only (Reports)-B	<input type="checkbox"/>
GRC-VO-11-BA	GRC View Only (Reports)-BA	<input type="checkbox"/>
GRC-VO-11-BC	GRC View Only (Reports)-BC	<input type="checkbox"/>
GRC-VO-11-BF	GRC View Only (Reports)-BF	<input type="checkbox"/>
GRC-VO-11-BI	GRC View Only (Reports)-BI	<input type="checkbox"/>
GRC-VO-11-BR	GRC View Only (Reports)-BR	<input type="checkbox"/>
GRC-VO-11-C	GRC View Only (Reports)-C	<input type="checkbox"/>
GRC-VO-11-CF	GRC View Only (Reports)-CF	<input type="checkbox"/>
GRC-VO-11-CH	GRC View Only (Reports)-CH	<input type="checkbox"/>
GRC-VO-11-CO	GRC View Only (Reports)-CO	<input type="checkbox"/>
GRC-VO-11-CX	GRC View Only (Reports)-CX	<input type="checkbox"/>
GRC-VO-11-Contractor	GRC View Only (Reports)-Contractor	<input type="checkbox"/>
GRC-VO-11-D	GRC View Only (Reports)-D	<input type="checkbox"/>

Contractor's access to Items and Scheduled Offerings is controlled through the creation of Catalogs. Administrators that create Catalogs assign them through an Assignment Profile. In the Assignment Profile you can select the sub-Domains of Users that will



have access to a Catalog. If they wish to create a Catalog exclusively for contractors, they will select the Contractor sub-Domain in the Assignment Profile.

Therefore, any Items or Scheduled Offerings that are placed in that Catalog will only be accessible by contractors. Or, an Administrator can select the Level 1 Domain, which will include all sub-Domains under that top level Domain (including contractors). In this case, all civil service and contractor employees would have access to Items and Scheduled Offerings placed in this Catalog.

When the Administrator places a Scheduled Offering in a Catalog that is accessible to contractors, he or she will select at least the two-step Supervisor/Training Coordinator approval process. It is important to note that when the Training Office sets up the Training Coordinator (TC) role, they assign the control Domain for civil service employees. For contractors, the Training Office should set up one Administrator as the TC for the Contractor sub-Domain so that all requests come to that one person. That person will hold all those requests until the registration cutoff date. If there are seats available in the offering at that point, they will approve enough contractors to fill the course and then waitlist the remaining contractors (done from the Administrator side of the system).

Account for Pending Civil service employees. SATERN Administrators shall not give spots in a Scheduled Offering to contractors if any civil service employees are in the approval process but are not yet enrolled. When any Administrator looks at the registration tab of a Scheduled Offering, they should assume that the civil service employee Users with a status of Pending are going to get into the course and then calculate the number of contractors to enroll to fill the course. If a civil service employee registers after a contractor is enrolled in a class that is full, (i.e., no vacancies), then the contractor must give up the enrollment to the civil service employee if the civil service employee registration is approved within the timeframe specified below.

When the Administrator places a Center Scheduled Offering in a Catalog that is accessible to contractors, he or she will select an approval process that contains, at the least, the Supervisor and Training Coordinator approval roles in the approval process. It is important to note that when the Training Office sets up the Training Coordinator (TC) role, they assign the control Domain for civil service employees. For contractors, the Training Office should set up one Administrator as the TC for the contractor sub-Domain so that all requests come to that one person. That person will hold all those requests until the registration cutoff date. If there are seats available in the offering at that point, they will approve enough contractors to fill the course and then waitlist the remaining contractors (done from the Administrator side of the system).

The final approver (typically a Center Administrator) in the approval processes used for Scheduled Offerings will hold all contractor requests until the registration cutoff date has passed. If there are seats available in the offering at that point, the Administrator will enroll enough contractors to fill the course in order of date and time of registration and then waitlist the remaining contractors (done from the Administrator side of the system). Only contractors pending with the Training Office will be enrolled or waitlisted.

Civil service employees who are pending as of the registration cut-off date and time should be dispositioned by the final approver (on that Scheduled Offering) within 48



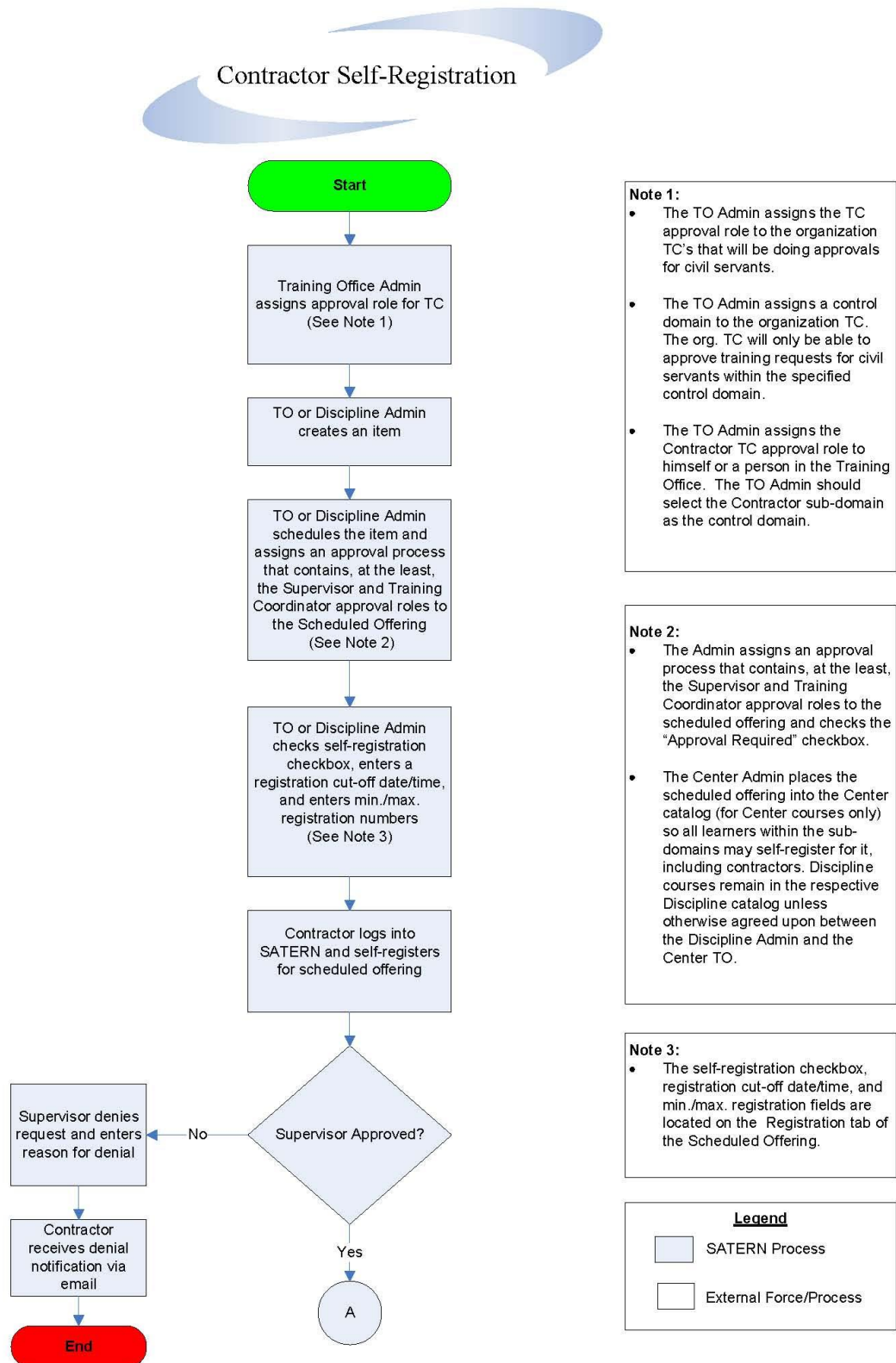
hours (if the start date of the course is one week or less after the registration cut-off date, or if the course is an NSTC course). After the civil service employees have been approved, the Center Administrator will fill the remaining seats with contractors.

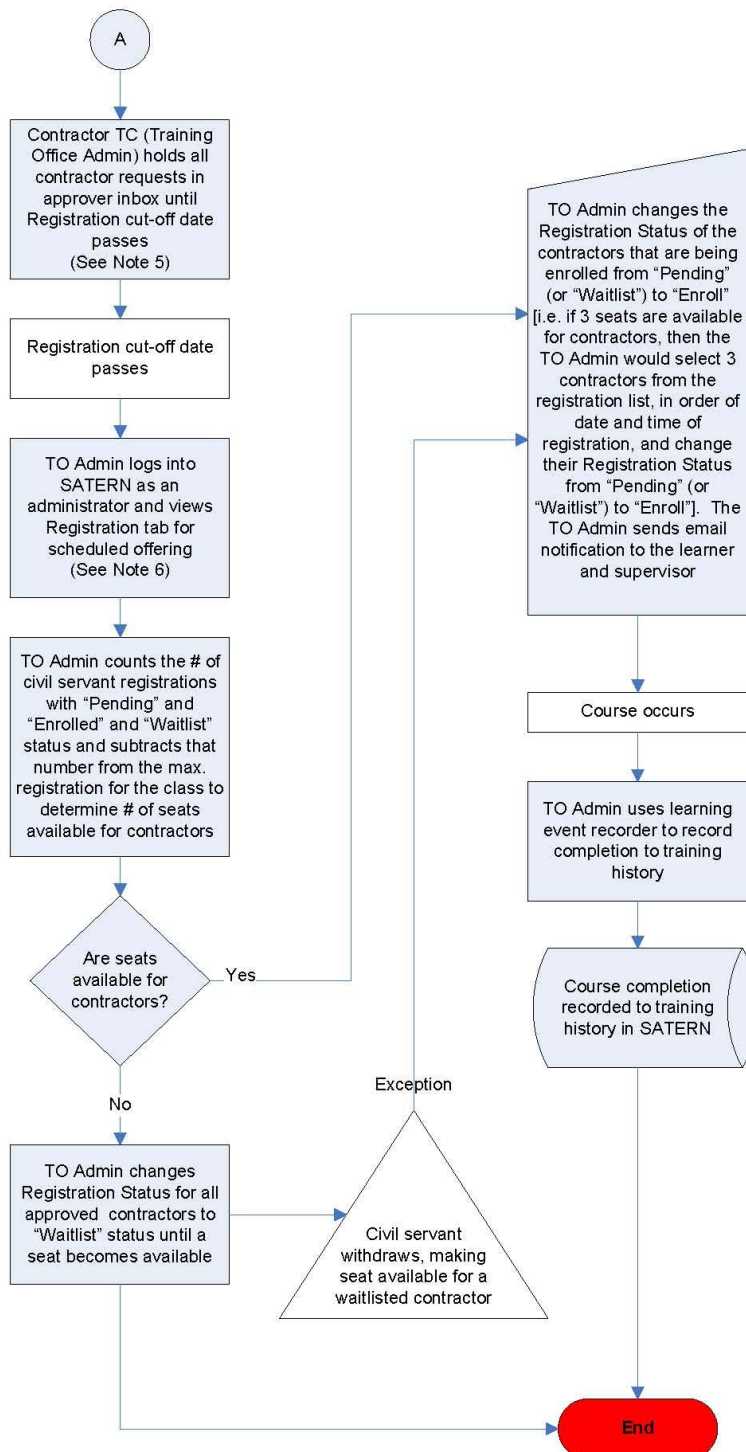
When a civil service employee requests registration via phone or email for a Center or Discipline Scheduled Offering after the registration cut-off date and the request is at least one week before the start of the course, the contractor who was the last to be enrolled (by registration date and time) should be waitlisted to make room for the civil service employee. Any request less than one week before the start of a course is based on space availability and contractors will not be removed to make room for a civil service employee.

When a registration deadline is extended (e.g., due to low enrollment), the process as outlined above will be followed.

Exceptions to using the above mentioned approval process that contains, at the least, the Supervisor and Training Coordinator approval roles in the approval process, are for the disciplines. For Scheduled Offerings by the disciplines, the approval processes agreed upon between the Discipline and the Center where the training is being held will be used. For Scheduled Offerings open to other Centers, the four-step Center-HCTO approval process will be used, unless otherwise agreed upon between the Center and the discipline Administrator.

The process flowchart shown below describes the process.



**Note 5:**

- TO Admin will be able to identify contractors on the approval screen by the C - prefix in front of the learner ID.

Note 6:

- TO Admin will be able to identify contractors in the registration list by the C - prefix in front of the learner ID.
- TO Admin will be able to see registration status (Pending, Enrolled, Waitlist, etc.).

Note 7:

- TO admin. should not change the Registration Status of any civil servants with a "Pending" status. The TO admin. may change the Registration Status to "Enroll" once the supervisor and TC have approved the request and it has gone to a "Waitlist" status.

An important part of the flow is the role of the Supervisor. In the Federal Government, the COTR has the responsibility for all contractors working on contracts that he or she manages.

Contractor Training Policy

NASA Policy Directive 3410.2F. reads: "Permit NASA contractor personnel to attend authorized and scheduled NASA training, provided that space is available and such attendance does not deny civil service employees the training. The training must be necessary for Government purposes. The basis for training of contractors derives from the authority to administer contracts. Contractors may, therefore, only be trained in skills that they are not required to bring to the job and, without directly reimbursing the Agency, if there is a benefit to the Agency or a governmental interest for such attendance."

Only the COTR, the government's responsible official, can determine whether sending the contractor to training for a billable hour, rather than working that billable hour, is the best use of NASA funds, a benefit to the Agency, or in the government's interest.

Note that the SATERN Supervisor is only an Approval Role used to automate approvals during the self-registration process. SATERN is not the system of record for Supervisors.

Rule: All contractors shall select their COTR as their Supervisor if they wish to self-register for onsite training at NASA. This can be updated in the User's Personal Profile as shown below.

The screen below shows the Personal Profile where a User may update his or her Supervisor. Contractors need only fill in their COTR in this field for the approval process to comply with NASA policy and work correctly in SATERN.

The screenshot shows the SATERN Personal Profile page for DENNIS C CONRAD. The page includes a header with the user's name and organization, and a 'Map' link. A red arrow points to the 'Supervisor' field in the 'Edit Employee Information' dialog box. The dialog box contains the following fields:

- * Required Field(s)**
- Supervisor:** taspicer
- Organization:** GRC-CFD0
- Coach/Mentor:** (empty field)
- Supervisor By-pass Flag:** Y (Yes)

The dialog box also has 'Save' and 'Cancel' buttons.

Approvers will be able to distinguish between contractors and civil service employees by looking at the User ID on the approval screen. Contractors will have the C- prefix.

Pending Reviews and Approvals

This view shows you all of the review and approval actions you have been asked to perform. It is divided into two primary sections: reviews and approvals for performance management activities, such as competency assessments (only if available); and approvals for training requests. You may switch between sections by clicking on the appropriate section header. Within each section you will find a list of specific reviews or approvals you are being asked to perform, categorized by action type.

Performance Management (0) Training (11)

Training

▼ Internal Training (1)

☒ Enter Reasons for Approvals or Denials ☐ All ☐ Direct Reports Only

Org ID	User Name	Learner Name ▲	Title	Price	Type	[Approve All/Deny All]
GRC-CFD0	C-lkbaker	BAKER, LAURA K	NASA PM CHALLENGE 2010		ENROLLMENT	<input type="radio"/> Approve <input type="radio"/> Deny <input type="radio"/>

▶ External Training (10)

Center-Unique User Domains

Situation: Domains are important structural entities in SATERN and must be managed very carefully. In certain special circumstances, a Center may need to create additional Domains for Users to satisfy a particular business need. Given their importance and the fact that only the SATERN Technical Team at NSSC can create new Domains, a process is needed for requesting Center-unique User Domains.

Agency Process: When requesting Center-unique User Domains, Centers will follow the process outlined below:

1. A Center representative makes the User Domain request to the SATERN Help Desk at 1-877-NSSC-123.
2. NSSC personnel at the SATERN Help Desk write up the request and forward it to the members of the SATERN Executive Committee (EC), who represent the Office of Human Capital Management to review Change Requests and proposed business rules. EC active member list can be found on SATERN Informational Web site (<https://saterninfo.nasa.gov>, Key Contacts > Program Team).
3. If the EC approves the request for a Center-unique User Domain, the NSSC SATERN Technical Team creates the new Domain in SATERN and informs the Center when the work has been completed.
4. The requesting Center has the responsibility of manually moving Users from the current Domain to the new Domain and maintaining the data.

Note: Since the Center SATERN Administrators will have to manually keep the data up-to-date in the new Domain, the Center Level 1 Administrator should make the request to the NSSC. Also, there are no naming convention restrictions for Center-unique User Domains. Some Centers use an Organization Code of Z-0000 for Users that have special characteristics. For example, GRC has decided to use GRC-ARMY for the Army personnel at GRC.

Reorganizations: Another type of Domain request is when a Center has a reorganization that changes Organization codes for Users at that Center. It is important



to inform the NSSC at 1-877-NSSC-123 as soon as possible prior to the reorganization so that SATERN is ready to accommodate any new User information that may be coming in from the daily FPPS and IDMS data feed.

Assignment Profiles

The Assignment Profile functionality provides a way to automate assigning Curricula to a group of Users who share the same training needs. The Assignment Profile uses the common attributes of a group of Users to assign Curricula. One useful way to group Users at NASA is to assign training based on information contained in a User's Custom Fields. For example, if you wanted to push out training to all Supervisors, you can set up an Assignment Profile containing all Supervisors at a Center and assign a Curriculum to that group. In addition to being efficient, the group that you defined in the Assignment Profile is automatically updated as members of that group take on or lose a Supervisory role. SATERN will add or delete the Curriculum from the User's Learning Plan based on the code or codes you used when you set up the Assignment Profile.

Situation: It is desirable for NASA to utilize the Assignment Profile functionality, however, according to the Privacy Act of 1974, as amended, "disclosure of Agency records that contain individually identifiable information is prohibited." The Act restricts an employee's personal data to only those Administrators with a "need to know." SATERN currently contains individually identifiable information but that data is restricted to Level 1 Regional Administrators only.

Normally, to add an Assignment Profile based on User custom column codes, Administrators would go to the Assignment Profile tab under Resources and follow the process: click "Add New", search for and select a group of Users. To comply with the Privacy Act of 1974, however, the search custom fields functionality has been turned off for all Administrators and thus even Level 1 Administrators may not search custom fields to identify or group Users. As a result, an Agency process is needed to enable Administrators to utilize the Assignment Profiles functionality while ensuring compliance with the Privacy Act of 1974 provisions.

Agency Process: To enable Administrators to utilize SATERN's Assignment Profile functionality in light of the Privacy Act of 1974 as amended, only SATERN Level 1 Regional Administrators will have the ability to preview the Users that match the Assignment Profile. Level 1 Administrators can also use the User Reference Code Values table in the Appendix to select a group of Users for use in Assignment Profiles where a referenced User attribute does not exist (i.e., NASA Class Code). The steps below contain SATERN screen shots that describe the process that can be used.

Assignment Profile for Catalogs: Access to view Catalogs is given through the Assignment Profile process. Only Administrators with the ALL or Level 1 (RA-1) have the workflows to create Assignment Profiles. Therefore, Center Level 1 Administrator will be responsible for creating and propagating Assignment Profiles for their Center Catalogs. NSSC will be responsible for creating and propagating the Assignment Profile for the NASA and Discipline Catalogs. Naming convention for Assignment Profiles should follow the guidelines under the Data Entry and Data Consistency section on p. 9 (e.g. NASA-CATALOG-ALL, GRC-CATALOG-CS).

Step 1: Add a new Assignment Profile

A. Under Learner Management, click Assignment Profiles (AP). Then “Add New”.

SATERN
System for Administration, Training, and Educational Resources for NASA

Administration | Quick Links: [Dropdown] | Home | Preferences | Help | Logout

[Learner Management](#) | [Performance](#) | [Learning](#) | [Commerce](#) | [Content](#) | [Reports](#) | [System Admin](#)

Assignment Profiles [Search] **Add New** | Help |

Saved Searches [Dropdown]

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: ☐ Yes ☒ No

Assignment Profile ID: Starts With [Dropdown] [Text Box]

Description: Starts With [Dropdown] [Text Box]

Add/Remove Criteria [Icon]

[Search] [Save As] [Reset]

SATERN
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Administration | Quick Links: [Dropdown] | Home | Preferences | Help | Logout

[Learner Management](#) | [Performance](#) | [Learning](#) | [Commerce](#) | [Content](#) | [Reports](#) | [System Admin](#)

Assignment Profiles [Search] | Help |

> **Add New**

Add New Assignment Profile

* = Required Fields

* Assignment Profile ID: [Text Box]

Description: [Text Box]

* Domain: [Icon] PUBLIC [Text Box]

Email: [Text Box]

[Add] [Reset]

B. Enter Assignment Profile ID

C. Enter Description

D. Select Domain

E. Enter e-mail address of person responsible for this Assignment Profile.

F. Click the Add button



The screenshot shows the SATERN web application interface. At the top, there is a NASA logo and the text "SATERN System for Administration, Training, and Educational Resources for NASA". Below this is a navigation bar with links: "Administration | Quick Links: [dropdown] | Home | Preferences | Help | Logout". A secondary navigation bar contains: "Learner Management | Performance | Learning | Commerce | Content | Reports | System Admin". On the left, a sidebar menu lists: "Learners", "Assignment Profiles" (highlighted), "Job Positions", "Organizations", "Organization Groups", "Regions", "+ Tools", and "+ References". The main content area is titled "Assignment Profiles" and includes a "Search | Add New | Help" link. Below this is a "> Search > Edit Summary" link. The profile details are: "Assignment Profile ID: GRC-NEW_EMPLOYEE", "Description: New Employee Assignment Profile", and "Status: Valid". A "Propagate Assignment Profile..." button is present. At the bottom, there is a tabbed interface with tabs: "Role", "Review", "Summary" (selected), "Domains", "Attributes", "Curricula", "Cpty Profiles", and "Catalogs". Below the tabs is a link: "Edit the Assignment Profile".

G Add a Domain to the AP on the Domains Tab.

H. Add an Attribute or Attributes to specifically identify the group: Give the Group a number in the Group ID field and then select the Attribute (in our example, Supervisory Status) from the drop down box. Click Apply Changes.

I. Select "Values" for the Attribute, refer to the User Custom Fields Reference Code Values for code definitions, and add an attribute value. You can also click add one or more from list to view a list of values. Click Apply Changes.

Note: Some of the values for a given attribute are not contained in SATERN. Refer to the User Custom Fields Guide to Human Resources Reporting located in Appendix C. This document contains the allowable values for each User Custom Field. Level 1

Administrators can refer to this document when creating an Assignment Profile or for reporting on the User custom fields. Click "Return to the Main Attributes Page".

Step 2: Verify your Group of Users

Scroll down and see the "Learner Tools" Section. Select "Assignment Profile Learner Preview" to preview the Users matching your defined profile. (Note: Only Level 1 Administrators have access to the "Learner Preview" button.)

Step 3: Add a Course, Curriculum or Competency Profile to the Group you defined in the Assignment Profile:

Administrators add a Curriculum to the Assignment Profile just as they would assign a Curriculum to a User. The only difference is that they should click the "Propagate Assignment Profile..." button instead of assigning it to the User's Learning Plan.

Individual Development Plans (IDPs): The Office of Human Capital Management's position is that the Agency does support training contractors in skills that they are not required to bring to the job, so the development of the contractor resides solely as the responsibility of the company that employs the contractor. Understanding the Agency's position on developing contractors, the IDP functionality in the upgraded SATERN software was limited to NASA civil service employees. System Administrators can now allow groups of Users to access any combination of User menus and submenus by assigning a User role with an Assignment Profile. Therefore, it is now possible to grant



different communities of Users' different menu level access. In the SATERN Production environment, the NASA Shared Services Center will create an Assignment Profile that will target new auto-generated contractor accounts. The Assignment Profile will assign the contractor User role to the contractor account removing the "Career" tab from the User site.

Users Recording their own Learning

Guidance: Any Item that is self-paced or outside SATERN that the Center wants to place in the Catalog can be made available to Users to record to their Learning History after completion. Examples would include On-the-Job Training (OJT), reading a book or document, or watching a video. To enable the ability for Users to record their own learning, Administrators should be sure that Item is in a Catalog and then check the box "Learners can record Learning Events for themselves."

Record Learning Event Using Quick Links

Situation: During 5.8 User Acceptance Testing a new feature was tested for recording Learning Events through Quick Links. It was noted during the testing that when recording a Learning Event through Quick Links that the Custom Fields, Per Diem, Travel, Book_Material_Cost, and Per_Participant_Cost are not available to complete. These fields only show up if you use the Learning Event Recorder (Learner Management>Tools>Learning Event Recorder).

Rule: The Record Learning Event feature through Quick Links shall never be used to record a Learning Event. All recorded Learning Events shall use the Learning Event Recorder (Learner Management > Tools > Learning Event Recorder).

Plateau Administration - Windows Internet Explorer

https://nasa58.gpehosting.com/plateau/admin/main_frameset.jsp?hideLeft=true&selectTag508Hiddenpage=8page=%2Fplat

File Edit View Favorites Tools Help

Links RR AOL Brio ODS CFCU CFCU- CPAR Logon CRSE ANN SATERN Admin (P) SATERN Learning (P) Employee Express eOPF Login

Plateau Administration

NASA SATERN System for Administration, Training, and Educational Resources for NASA

Administration | Quick Links: | Home | Preferences | Help | Logout

Learner Management | Performance | Learning | Commerce | Content | Reports | System Admin

Learners
Assignment Profiles
Job Positions
Organizations
Organization Groups
Regions
Tools
Learning Event Recorder
Learning Event Editor
Merge Users
Send Notifications
Supervisor Assistant
Learner Needs Mgmt
References

Learning Event Recorder | Help |

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6

Step 6: Edit Learner Event Financial Information

Previous Next

For each learner you may either enter the Price and Cost and Profit Centers or you may enter an order ticket.

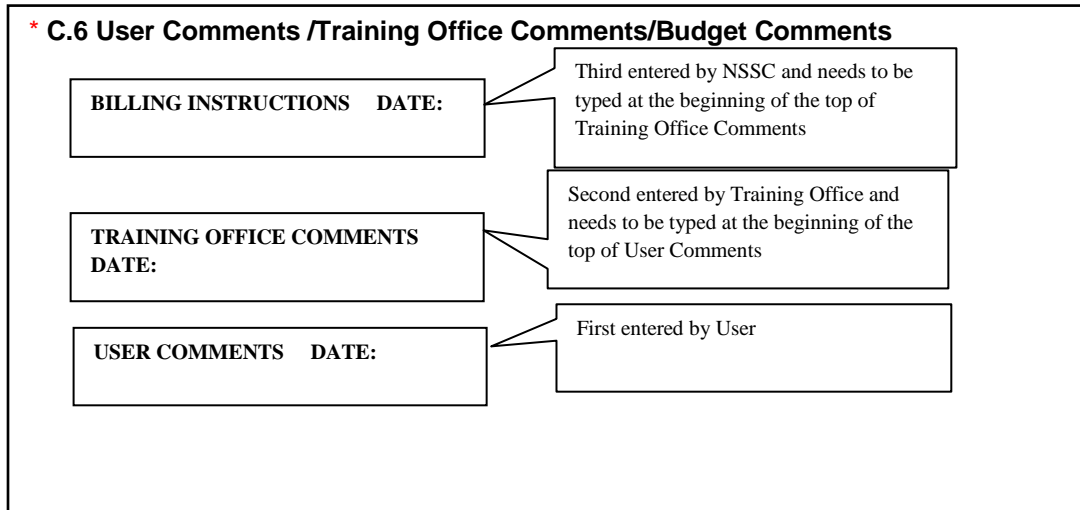
Learner	Price (1000)	Currency	Cost Center Account Codes	Profit Center Account Codes	Order Ticket
dcconrad (CONRAD, DENNIS C)	0.00	US Dollar (USD)			
All Costs below are in: US Dollar (USD)					
Per_Diem					
Travel					
Books_Material_Cost					
Per_Participant_Cost					

Start Search Results 2 Internet E... 5 Microsoft Of... 3 Microsoft Of... Microsoft Excel ... 1:18 PM

External Training

Completing the Comments Box: The 182 Form does not have boxes for the User Comments or the Training Office Comments. It was recommended that Box C6 on the SF-182 label be changed to "User Comments/Training Office Comments/Billing Instructions" thus creating a multi-use comments box in 5.8.

Rule: Users, SATERN Administrators, NSSC Approvers should place their comments in Box C6 *User Comments/Training Office/Comments/Billing Instructions* on the SF-182 form. The newest comments should be placed at the top of the comments box under a header prior to the next section. Headers should be all caps and dated as follows: USER COMMENTS xx/xx/xxxx TRAINING OFFICE COMMENTS xx/xx/xxxx, BILLING INSTRUCTIONS xx/xx/xxxx.



Withdrawing a User: The SF-182 Form does not have an automatic Notification capability to send a notice to the User, Supervisor or Training Office when a SATERN Administrator withdraws a User's SF-182 request.

Rule: The Administrator who withdraws the User should send a note to the User, the Supervisor and the Training Coordinator advising them of the action and the reason.

Associating Competencies with Items

The ability to associate a competency with an item provides a benefit to the learner when they are adding competency-related goals and activities to their IDP. It also provides benefit to the Center whose Training Offices and Workforce Planning Offices wish to run reports associated with training on certain competencies.

Situation: Since neither the Centers nor the NSSC are associating competencies with items, there is no infrastructure in place to support the function to add competency-related goals and activities to the IDP, yet we have developed training materials and Quick Reference Guides that train our learners how to do this. This often leads to learners' frustration with the IDP when they search for competency-related items and yield no results.

Rule: When new items are added to SATERN, the administrator must associate at least one primary competency to the item. The Center may associate as many competencies as they feel necessary to capture data needed for reports and to better assist the learner in identifying competency-related activities on the IDP. Because competency ratings serve no purpose in SATERN, the administrator should leave the Rating at "1".



Scheduling

Scheduling management is the process of creating Scheduled Offerings for Instructor-led Items or Activities. The person responsible for these actions is the Administrator who initiates the registrations (e.g., NSSC or Center/Discipline Administrators).

User No Show

Situation: There will be instances where a User does not show up for training. The Administrator needs to indicate this in SATERN since SATERN cannot know if the User attended the training.

Rule: If a User does not show up for training, Administrators shall change the User's registration status from ENROLL to NO SHOW.

Change the User's registration status on the Registration tab of the Scheduled Offering prior to recording the Learning Event. This takes the User off the roster for the Scheduled Offering and does not record a training completion to the User's history.

Segment Offset

Situation: Course duration is written to history based on the Segment time that is entered. For a full, eight-hour day, if Administrators do not exclude the lunch break, the break will be included in official course time recorded to the User's history.

Rule: When scheduling an eight-hour day, enter two four-hour blocks/Segments with a half-hour or hour time block for lunch so that only 8 hours is recorded. This time block is referred to as a "Segment Offset."

Resolve Resource Conflicts Outside the System

Situation: Error messages prevent conflicts in the system and assist the work of the Administrator, but SATERN does not have the functionality to resolve the conflict within the system. Since Centers use differing methods for scheduling resources Agency guidance is required.

Rule: While SATERN will provide an error message if instructors or locations are double-booked, Administrators shall ensure the availability of resources outside the system prior to scheduling them in SATERN.

Scheduled Offerings for Courses Evaluated Using Metrics That Matter (MTM)

Situation: With the interface of SATERN to the Metrics that Matter (MTM) evaluation tool, guidance for SATERN Administrators is needed to outline the necessary fields as well as timing for completion. Student information will be passed from SATERN to MTM on a nightly basis for all classes that are closed out in SATERN. For guidance regarding which courses should be evaluated using MTM, refer to the Agency Evaluation Guidelines.



Rule: If a Scheduled Offering will be evaluated using MTM, SATERN Administrators shall:

- Indicate that MTM evaluation is required by selecting “Y” in the MTM custom field in the Item.
- Ensure that a minimum, a primary Instructor and Facility ID are assigned to the Scheduled Offering. (Note: Multiple instructors can be assigned in Segments.)
- In the instructor record, ensure the following required fields are entered:
 1. Instructor(s) name
 2. Instructor(s) e-mail
- Inactivate the Scheduled Offering no later than close of business five (5) business days after course end date. (Note: *The **Active** box should be unchecked on the Scheduled Offering Summary tab.*)

Scheduled Offerings for NASA Safety Training Center (NSTC)

Situation: NSTC Items have been created and placed in the SMA Domain. All NSTC Items have been given an Item ID that begins with SMA-SAFE-NSTC- followed by a number. To prevent duplication of Items and to ensure accurate reporting on completion of NSTC Items, two rules must be followed:

Rule: Center Administrators shall *not* create their own NSTC Items and place them in their Center’s Domain.

Rule: NSTC Administrators should schedule the NSTC Items that are in the SMA Domain and should place those Scheduled Offerings in the SMA Domain.

Rule: Center Administrators shall *not* create schedule offerings for NSTC Items and place them in their Center’s Domain.

Situation: To maximize enrollment into NSTC offerings, all NSTC Items and Scheduled Offerings appear in the NASA Catalog. In cases where NSTC offerings enable self-registration, Users must know the Center at which the offering is taking place when they are viewing the offering in the Catalog.

Rule: NSTC Administrators shall add the Centers prefix to all Center Facility Description fields. This rule is also cited in the business rules for **Other Center Training**.

Situation: The NSTC at Johnson Space Center is responsible for managing the shipment of course materials to all of the Centers. In order to help them gauge the number of materials to reproduce or order and to ship the appropriate number of materials to the Centers, they must have adequate lead time.



Rule for NSTC Administrators Only: When entering a Registration Cut-off Date for an NSTC Scheduled Offering, the registration cut-off date must be at least 30 days from the Start Date of the offering.

SATERN Rosters for Verification

Situation: A SATERN roster includes the printed name of the employees registered and provides a place for their signature. This form allows Administrators to clearly see who is registered and who did or did not sign in for the class. Therefore the following business rule is recommended:

Rule: For Scheduled Offerings in SATERN, the Center Training Office should use only **SATERN** rosters for sign-in and attendance verification, and should send only SATERN generated rosters to the NSSC for course close-out process. The NSSC shall only accept **SATERN** rosters.

Updating the Enrollment Status for Walk-ins

Situation: In version 5.5 of SATERN, employees who were not registered for a scheduled offering but showed up for a scheduled offering were allowed to sit in the offering as long as there was space available. An administrator would then enroll the employee in the scheduled offering prior to close out with a registration status of “Enrolled,” which did not reflect the true enrollment status. Centers could not report on the number of Walk-Ins for a scheduled offering.

Rule: Prior to closing out a scheduled offering, all walk-ins who completed the offering must be added to the roster with an enrollment status of “WALK-IN (Enrolled).” When faxing the Form 27 to the NSSC, indicate the walk-ins on the form.



Learning Management

Learning Management refers to the creation of content and courses in the system. In the past, Centers could use some fields to capture Center-only information. It is important to reiterate that the implementation of SATERN is at the Agency-level and thus all Centers must enter information the same way.

Domain Location for Items

Situation: With regard to adding Items to SATERN, an Administrator will not know whether to place the Item in the Center Domain, the NASA Domain or in the Discipline Domain.

Rule: Agency discipline Items will be placed in the Discipline Domain and then added to a Catalog when appropriate. When a Center has created or owns Center-specific training Items, those Items will be placed in the Center Domain, regardless of their relationship to discipline Subject Areas.

Custom Columns Data Entry

Background: NASA will use Custom Columns, also referred to as Custom Fields, to capture NASA-specific information that would not otherwise be possible if the SATERN software were implemented out of the box.

Filling in the Custom Columns is mandatory. The first 16 custom columns are required by NASA to satisfy specific reporting requirements mandated by OPM. The column numbers 5, 6, 8, 9, 10, 14, and 25 are required for NASA use and vary by Center.

The Custom Columns are shown below as they appear in the system:

Substitutes	Online Settings	Notifications	Materials	Objectives	Grading Options
Tasks	Curricula	Competencies	Custom Fields	Requests	Rqst Reasons
Summary	Design Data	Delivery Data	Instructors	Prerequisites	Documents

Edit the Custom Fields for the Item

Apply Changes Reset

Column Number	Label	Value
5	Type of Training Sub-Code	01-05 (Human Resources) ▾
6	Source of Training	03 (Non-government) ▾
8	Academic Credit Code	05 (N/A) ▾
9	Training Credit Type Code	03 (Continuing Education Unit) ▾
10	Direct Cost Code	D (Contract - Funded by Agency) ▾
14	Indirect Cost Code	A (Individual - Funded by Center) ▾
17	PO Number	<input type="text"/>
18	Category Code	<input type="text"/>
19	Sub Category Code	<input type="text"/>
20	Funding Organization	<input type="text"/>
21	POC	<input type="text"/>
22	Budget Line Item	<input type="text"/>
23	Metrics That Matter (MTM)	<input type="text"/> ▾
24	P/PM RE-CERTIFICATION	<input type="text"/> ▾
25	Training Vendor (ORG ID)	<input type="text"/>

Situation: With regard to filling in the mandatory custom column information, Administrators have two places where they can fill in this information: at the Item-level or at the Scheduled Offering level. Filling in the information at both levels would be inefficient because the information is redundant. In addition, there is no need to fill in the custom fields in the Scheduled Offering because they are copied from the Item when the Scheduled Offering is added. The exception is the Metrics That Matter (MTM) field which does not exist at the Scheduled Offering level.



Rule: The custom columns are mandatory fields and must be filled in at the Item level. Therefore, Administrators shall:

- Enter the custom column information at the **Item** level for all Items.
- Edit the Scheduled Offering custom columns that typically vary per Scheduled Offering (i.e. POC, Funding Org).

Completing Required Fields for MTM

Refer to “Scheduled Offerings for Courses Evaluated Using Metrics That Matter (MTM)” on p. 28

SOURCE ID Field

Situation: Reporting on external or internal training activity is enhanced by using the SOURCE ID field in the Item Record.

Rule: Select INTERNAL for on-site training and EXTERNAL as the SOURCE ID for all off-site/external training.

The definitions for INTERNAL and EXTERNAL follow:

INTERNAL – On-site training coordinated by the Training Organization or Discipline for multiple employees, which may or may not include any cost. All NASA-sponsored web-based training (e.g., SkillSoft) is considered INTERNAL.

EXTERNAL – Off-site training – External Training provided to individuals or groups such as conferences, seminars, academic classes, etc. Usually requires the submission of a SF-182 via SATERN for approval and processing. The only exception to the NSSC processing external training, captured on the SF-182, would include Reportable conferences. Reportable conferences, as defined per NID 3712.1, “Requirements Relating to Conference Attendance, Obligations and Expenditures” shall be submitted as a No Cost entity on the SF-182, with all pertinent cost information captured in the “course comments” section for Center processing and registration purposes.

Agency-wide Courses

Situation: Assigning courses to a User’s Learning Plan is functionality in SATERN. There is currently no Agency policy on who may put Agency-wide mandatory courses on the User’s Learning Plan. The concern is that it could be overwhelming to the User if there is no policy that determines who is allowed to push training.



Rule: SATERN Administrators in the Training Office are responsible for assigning mandatory Agency-wide training within SATERN. Administrators shall assign approved federally mandated training by adding the course to the learning plans of the impacted audiences by assigning via curriculum. When mandatory training limited to selected audiences (i.e., not Agency-wide) is required, Disciplines will have the ability to push courses to that audience without the prior approval of the Training Offices.

Rule: If the course is Federally Mandated, Training Office Administrators shall assign mandatory training to the required audiences at their Centers, unless the training is already handled by a Discipline. This shall be done by setting up a curriculum and adding the curriculum to the learner's plan.

Situation: SATERN allows Administrators to give credit for courses when an equivalent external course has been successfully completed.

Rule: Administrators must request approval for any desired equivalent course from the course owner. The Course Owner is typically the person listed in the Item Record Contact Email field and is the person whom Centers should contact to apply for equivalent status. (If the Points of Contact (PoCs) listed in the Contact Email field are not appropriate, they will know to whom in the Discipline leadership to take the request).

After verifying approval for an equivalent course, the appropriate Center or Discipline Administrator will grant credit for the SATERN Item via the Learning Event Recorder. The Administrator will use a Default Completion Status of "Substitute" and will complete the "Comments" field in "Step 5: Edit User Even Information" with the appropriate equivalent course information (i.e., course name, vendor, date, etc.).

Substitutes for Agency-wide Courses

Situation: SATERN allows Administrators to create Substitute relationships with existing courses thereby granting credit for both courses to Users. Since SATERN provides Agency-level reporting for Agency-wide courses, guidance is needed to ensure that the reports are accurate. In the past, Centers were not required to notify course owners when they allowed their Center's course to provide Substitute credit for an Agency-wide course.

Rule: Administrators must request approval for any desired substitutions with the course owner. The Course Owner is the person listed in the Item Record **Contact Email** field and is the person whom Centers should contact to apply for Substitute status. If the PoCs listed in the Contact Email field are not appropriate, they will know whom in the Discipline leadership to take the request.)

After verifying approval for a Substitute course, the Course Owner will add the Substitute to the Agency-wide course. The Course Owner will notify the requesting Administrator whether the Substitute has been approved and if so, when it was created within the system. It is important to note that Users will get two Items written to history



with a Substitute, so Reporters will have to learn how to run reports in a way that enables them to get an accurate count.

Program/Project Managers Certification

Situation: NASA's Academy of Program/Project and Engineering Leadership (APPEL) has established processes to document the certification status of each certified P/PM and to track participation of continuous learning activities necessary for recertification through the SATERN. Certified NASA P/PMs will have a designation in their SATERN Learning History which reflects their certification status including the date certified. Therefore, SATERN tracks P/PM Certification continuous learning activities.

Rule: The recording of the FEDERAL ACQUISITION CERTIFICATION FOR PROGRAM/PROJECT MANAGERS-SENIOR/EXPERT (FAC-P/PM-SR/EX)" Item in SATERN shall be done by the APPEL SATERN Administrator only.

Other SATERN Administrators should not utilize the "FEDERAL ACQUISITION CERTIFICATION FOR PROGRAM/PROJECT MANAGERS-SENIOR/EXPERT (FAC-P/PM-SR/EX)" Item located within the NASA Domain.

Rule: Once a Center's or Discipline's course has been reviewed and designated by APPEL as applicable to P/PM Re-certification, SATERN Administrators shall

- Indicate that it is P/PM Re-certification applicable by selecting "Y" in the P/PM Re-certification custom field in the Item and add P/PM Re-certification subject area.
- Ensure that the CPE field is populated with the designated number of CPE hours.
- Ensure that the Item has been added to the P/PM Re-certification Catalog.

- Use of the "P/PM Re-certification Self-Recordable Activities" child-level subject area should be restricted to the APPEL SAL only. If a Center or Discipline has need to utilize this child-level subject area, they should contact the APPEL SAL.

Evaluations

The SATERN Standard Agency Level 1 Evaluation for instructor-led and online learning evaluates the Users' reaction to the training. It is a valid measurement tool that allows Centers to reliably gauge satisfaction, gain immediate feedback, and provide comparisons of courses/programs. Often only a Level 1 evaluation is necessary, depending on the type of training, level of investment, etc. The SATERN Level 3, follow-up evaluation, evaluates Users' behavior after the training and assesses application of knowledge. MTM uses a five-level measurement model, the Kirkpatrick/Phillips Model, which goes beyond the SATERN Level 1 and 3 evaluations. The five levels include satisfaction, learning effectiveness, job impact, business results, and return on investment.



Situation: There is a need for standard data collection, storage, and reporting processes for training within NASA, as well as the ability to analyze training data across NASA. It is important to efficiently and effectively collect training data in a practical, scalable and repeatable manner. Managing the evaluation process can be a highly administrative effort.

Rule:

- SATERN Administrators should use the SATERN Level 1 Agency standard evaluation for applicable internal training (instructor led and online learning). Administrators should not add, delete or modify questions in these standard evaluations.
- SATERN Administrators should not use the Level 3 evaluation functionality in SATERN. If Level 3 evaluation is required, SATERN Administrators should contact the Agency MTM Administrator.
- SATERN Administrators should not set a Level 1 survey as required for Item completion.

Use of the SF-182 for Conferences

Situation: The NASA Interim Directive on conference tracking indicated the requirement that the Conference code and name be preceded by CONF, Conference Number, and Conference Name in the title field of the external training request.

Rule: Field B.2.a of the SF-182 External Training Request shall be used to record the Conference Code and Name from the NASA Conference Tracking System (NCTS) located at <http://ncts.nasa.gov/ncts/user/index.jsp>.

In accordance with NASA Interim Directive 9312.3 the first characters in the title field must be "CONF" followed by the Conference Identifier (code/name) from the NCTS (e.g. CONF 12754-10-ST 48th AIAA Aerospace Sciences Meeting). It is the Center Training Office responsibility to ensure that the correct data is entered in this field prior to approval and forwarding of the SF-182 to the NSSC for processing.

Commerce

NASA has decided not to use the Commerce functionality available in SATERN. However, NASA will utilize the Catalogs functionality contained in the Commerce section of the Administrator User Interface. Catalogs are mentioned frequently throughout this document but with regard to the Commerce section of SATERN, there are no Business Rules currently defined.

Catalogs

A Catalog is used to make Items and Curriculums that are not part of a Learning Plan viewable to Users. Access to one or more Catalogs is based on attributes in an Assignment Profile.



Situation: An Item or Curriculum may reside in more than one Catalog. In order for a User to self-assign an Item, Curriculum, or self-enroll in a Scheduled Offering of an Item, the Item or Curriculum must reside in a Catalog to which the User has access.

Rule: Only Admins with the “All” role or “Regional Admin Level 1” role have the authorized workflow to create an Assignment Profile. Therefore, any Catalog creations for the Disciplines, (e.g., ITS, SMA) must be created by an Admin at the NASA Shared Services Center (NSSC), who has the authorized workflow. Assignment Profiles for Center Catalogs will be created by an Admin at the Center who has the authorized workflow. The Assignment Profile shall follow the naming convention listed in the Data Entry and Data Consistency section of the Business Rules Guide).

Resource Management

Resources are the objects, places, and people needed to provide training in an Instructor-led environment.

Working with Instructors

Situation: Instructors will not have access to the system. Therefore, it is important that Administrators know to work closely with instructors.

Rule: Since instructors do not have access to the system, it is the responsibility of the Training Office Administrator to provide instructors with the information they need. (If necessary, Administrators can send e-mail Notifications to instructors, copy them on rosters as Users are registered, and provide other details.)

Domain for Instructors

Situation: Instructors are added to SATERN by the NSSC in the Public Domain. As a result, the instructors are available to every Center in SATERN. Instructions on how to create an instructor follows:

Create Regions for each center: ARC, DFRC, GRC, GSFC, GSFC-GISS, GSFC-IVV, GSFC-WFF, HQ, HQ-JPL, JSC, JSC-WSTF, KSC, LARC, MSFC, MSFC-MAF, NSSC, SSC.

NOTE: Not identifying a region or center will not prevent an instructor from teaching at that center if desired later. This is only used in assisting to identify particular instructors and allowing searches for all qualified instructors at each center.

Rule: Create Instructor IDs using the naming convention of **I-** (eye dash), first initial, middle initial, last name to identify instructor IDs versus other IDs within SATERN. Information required that should be included for instructors:

ID, full name, company (if contractor or vendor) Domain, and organization (if civil service). Once the account is added, move to the **Authorized to Teach** tab and add all courses this instructor is authorized to teach. Now move to the **Regions** tab and add the regions for each Center this instructor is expected to teach at (home Center or Center of record should be selected as the primary to aid in identifying similarly named instructors from different locations).

Note: Before creating an Instructor Record, check and make sure that instructor does not already have an account in SATERN. If the account already exists, you should modify the assigned regions to include the new region/Center location and provide the instructor record ID to the original add instructor requester.

References

There are no Business Rules currently defined for the References section of SATERN.

Reports

The Reports section of SATERN is shown below. Standard SATERN reporting functionality addresses many general, NASA-internal and management-related reporting needs. The left navigation displays the standard reports that are available grouped by category.

The screenshot displays the SATERN Reports section. At the top, there's a navigation bar with links like 'Administration | Quick Links', 'Home | Preferences | Help | Logout'. Below this, a sidebar on the left allows users to 'Browse By' categories (Learner Management, Performance, Learning, Content, System Admin, Miscellaneous) and 'Publication Status' (Published, Unpublished). The main content area shows a list of 151 reports, sorted by Title. The reports are organized into a grid with columns for category (e.g., Miscellaneous, Learner Management, System Admin) and report details. Each report entry includes a title (e.g., 'Academic Grades', 'Admin Accounts', 'Approval Process Data'), a brief description, and a 'more' link for additional information.



Agency Process: To address identified Center reporting needs not covered by the standard reports available in SATERN, pre-defined custom reports (defined as reports that have been custom developed and are ready for use) will be available. For reporting needs beyond these, Administrators may invoke the exception process, whereby custom reports can be developed as needed according to the 1620 process located on the SATERN Project site (<https://saternproject.nasa.gov/>, Home > Submit a Change Request or Future Enhancement), which should only be submitted by Center or Discipline SALs.

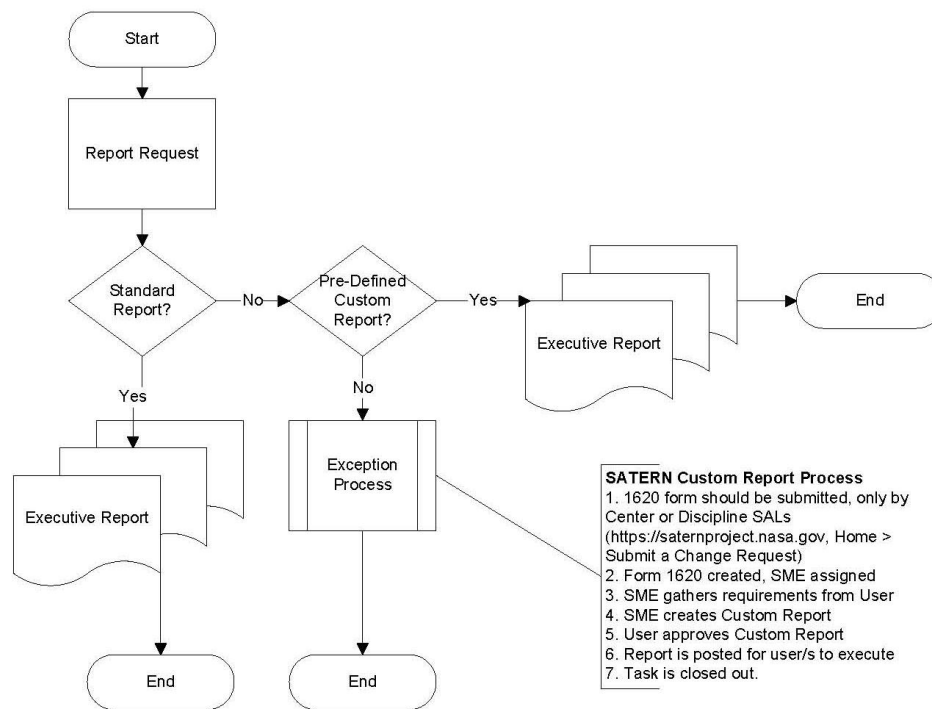
Situation: While the standard reports available in SATERN do provide for excellent and easy-to-use reporting on a variety of areas, the standard reports do not include the NASA custom column data and are therefore inadequate as a replacement for NASA current reporting capability.

Agency Process: To address identified Center reporting needs not covered by the *standard reports* available in SATERN, *pre-defined custom reports* (defined as reports that have been custom developed and are ready for use) will be available. For reporting needs beyond these, Administrators may invoke the *exception process* whereby custom reports can be developed as needed according to the *1620 process* located on the SATERN Project site (<https://saternproject.nasa.gov/>, Home > Submit a Change Request or Future Enhancement), *which should only be submitted by Center or Discipline SALs*.

Rule: Administrators will use the SATERN Report Process diagrammed on the following page:



Reporting Flow

**Chart 1: SATERN Agency Report Process**

Since custom reporting can be achieved in SATERN and there are developers familiar with the schema and XML in-house as part of the SATERN Technical Team, custom report creation is available to NASA to meet its current and future reporting needs. The SATERN Technical Team will use an external reporting tool in most cases to develop the reports.

Tools

There are no Business Rules currently defined for the Tools section of SATERN.

System Administration

Approval Role Management

To enable self-registration in SATERN, Administrators populate Approval Roles that correspond to steps in an Approval Process that they wish to use. For any Item or Scheduled Offering, an Approval Process can be assigned so that Users can self-register for the course by automatically starting the appropriate approvals that are needed for attendance.

Administrators can identify all the potential Approvers in as one certain role; which means that each potential Approver listed as that Role receives an email when that step in the Approval Process is reached. In practice however, receiving emails that are not for you can be annoying.

To enable additional flexibility for Administrators at the Centers that wish to more accurately identify the specific Approver/s that handle a certain course or type of course, the Approval Roles shown below were created. Now Center Training Offices can use 20 unique Training Office Specialist Roles for their staff, effectively eliminating approval requests that are not intended for them. The new Approval Roles are shown below:

SATERN
System for Administration, Training, and Educational Resources for NASA

Administration | Quick Links: [] | Home |

Learner Management | Performance | Learning | Commerce | Content | Reports | System Admin

- + Application Admin
- + Security
- + Automatic Processes
- + Configuration
- + Custom Columns
- + Tools
- **References**
 - Approval Process
 - **Approval Roles**
 - Countries
 - Currencies
 - Date Format Patterns
 - Degree Type
 - Esig Meaning Code
 - Holidays
 - Labels
 - Language Skills
 - Active Locale Labels
 - Active Locales
 - Number Format Patterns
 - Security Clearance Types
 - Subject Areas
 - Report Groups
 - Background Jobs

Records per Page: All (21 total records)


Approval Role ID	Description
TO-1	Training Office Specialist 1
TO-10	Training Office Specialist 10
TO-11	Training Office Specialist 11
TO-12	Training Office Specialist 12
TO-13	Training Office Specialist 13
TO-14	Training Office Specialist 14
TO-15	Training Office Specialist 15
TO-16	Training Office Specialist 16
TO-17	Training Office Specialist 17
TO-18	Training Office Specialist 18
TO-19	Training Office Specialist 19
TO-2	Training Office Specialist 2
TO-20	Training Office Specialist 20
TO-21	Training Office Specialist 21
TO-3	Training Office Specialist 3
TO-4	Training Office Specialist 4
TO-5	Training Office Specialist 5
TO-6	Training Office Specialist 6
TO-7	Training Office Specialist 7
TO-8	Training Office Specialist 8
TO-9	Training Office Specialist 9

Records per Page: All (21 total records)

As an example, if a Center uses the two-step Approval Process: Supervisor/Training Office Specialist, any User that self-registers for the Item or Scheduled Offering triggers an email to anyone that had the User's Domain Restriction and the role of Training Office Specialist. Using the above listed Approval Roles means that you can identify exactly who the correct person is (up to 20) that should be approving enrollments for that particular Item or Scheduled Offering.

Remember that using these Approval Roles will only work if you select the Approval Process that contains the desired Approval Role that you have pre-populated. Also note that in addition to these new Approval Processes available to you, the previously defined Approval Processes are still available for use at your Center. The new Approval Processes are shown in the screenshot below.





SATERN
System for Administration, Training, and
Educational Resources for NASA

Administration | Quick Links: | Home |

Learner Management | Performance | Learning | Commerce | Content | Reports | System Admin

+ Application Admin

+ Security

+ Automatic Processes

+ Configuration

+ Custom Columns

+ Tools

- **References**

- Approval Process

- Approval Roles

- Countries

- Currencies

- Date Format Patterns

- Degree Type

- Esig Meaning Code

- Holidays

- Labels

- Language Skills

- Active Locale Labels

- Active Locales


- Number Format Patterns

- Security Clearance Types











































- Subject Areas

- Report Groups

Background Jobs

Field Chooser 

Records per Page (136 total records)

Process ID ^		Process Name
1 STEP TC	 	1 STEP TC
1STEP SUPER	 	1STEP SUPER
1STEP_IEM	 	1STEP_IEM
1STEP_LC	 	1STEP_LC
2 STEP SUPER/CFO APPROVAL	 	2 STEP SUPER/CFO APPROVAL
2 STEP SUPER/CFO1 APPROVAL	 	2 STEP SUPER/CFO1 APPROVAL
2STEP SUPER/ARC NSTC POC	 	2STEP SUPER/ARC NSTC POC
2STEP SUPER/DFRC NSTC POC	 	2STEP SUPER/DFRC NSTC POC
2STEP SUPER/GRC NSTC POC	 	2STEP SUPER/GRC NSTC POC
2STEP SUPER/GSFC NSTC POC	 	2STEP SUPER/GSFC NSTC POC
2STEP SUPER/HCTO	 	2STEP SUPER/HCTO
2STEP SUPER/HQ NSTC POC	 	2STEP SUPER/HQ NSTC POC
2STEP SUPER/JSC CFO	 	2STEP SUPER/JSC CFO
2STEP SUPER/JSC NSTC POC	 	2STEP SUPER/JSC NSTC POC
2STEP SUPER/KSC NSTC POC	 	2STEP SUPER/KSC NSTC POC
2STEP SUPER/LARC NSTC POC	 	2STEP SUPER/LARC NSTC POC
2STEP SUPER/MSFC NSTC POC	 	2STEP SUPER/MSFC NSTC POC
2STEP SUPER/NSSC NSTC POC	 	2STEP SUPER/NSSC NSTC POC
2STEP SUPER/SEPG POC	 	2STEP SUPER/SEPG POC
2STEP SUPER/SSC NSTC POC	 	2STEP SUPER/SSC NSTC POC
2STEP SUPER/TC	 	2STEP SUPER/TC

Caution: Administrators that wish to utilize these Approval Roles and corresponding Approval Processes should be sure to closely track who in the Training Office has which Approval Role Number to ensure that the Approval Process used is the correct one. Confusion and delay for Users could result if a mistake occurs.

Note: If your Center would like to utilize other Approval Processes that are not currently defined in SATERN, you must call the Help Desk at 1-877-NSSC-123 to have those configured and created for use. (New roles can only be requested by a Center or Discipline SAL.) As an example, if you have an Approval Process that incorporates two Approval Roles that aren't in a sequence that is currently defined in SATERN, the Help Desk can create an Approval Process that will meet your business need. Keep in mind that Approval Roles and Approval Processes are available across the Agency, so be sure to check and see if your needs are met with the current configuration prior to calling the Help Desk.

Super-approval of Training Requests

Situation: Often Users are not receiving approval for Scheduled Offerings and/or external training in a timely manner due to the unavailability of Supervisors to approve the training.

**Rule:**

- If a User's Supervisor is unavailable to approve the Scheduled Offering and/or external training request in a timely manner, the Center Level 1 Administrator can approve the training with a written authorization (e-mail) from the User's Supervisor to approve the training for the User.
- The Administrator should use the comments field to include remarks that reflect that the approval was made by the Level 1 Administrator on behalf of the Supervisor. Administrators should not "super-approve" the Training Office step, because Training Codes cannot be entered.

Granting Administrator Access

Situation: There is a limit of three (3) Level 1 Administrators for each Center and Discipline. The Level 1 Administrator is the only role that may create Administrator accounts for other Administrators.

Rule: Level 1 Administrators may create lower-level Administrator accounts for Administrators at their Centers or within the Discipline but must notify the Center Training Office or the Center PoC of the account that was created. If other Level 1 accounts are desired at a Center or within a Discipline, the Center or Discipline SAL must forward the recommendation to the SATERN Agency Operational Support Lead listed on the SATERN Informational Web site (https://saterninfo.nasa.gov/Organization_Project_Team.html). Once approved, the SATERN Operational Support Lead will forward the request to the NSSC for creation of the new RA-1 account. Note that there is a limit of three (3) Level 1 Administrators for each Center and Discipline.

Granting Discipline Administrator Access

Situation: Given Privacy Act constraints and Domain controls in SATERN, only the Help Desk can create Level 8 and Level 9 Discipline Administrators. Since the Help Desk can neither verify nor authorize Discipline Administrative accounts in SATERN, the Discipline SAL must be responsible for those tasks.



Rule: Discipline SALs can authorize Discipline Administrator accounts in SATERN. Level 1 Administrators at the Center can also authorize and assign only the View Discipline Items role to their lower-level Administrators at the Center.

Process: Anyone requesting full Discipline Administrator Access must make the request to the Discipline SAL. Once the Discipline SAL verifies and authorizes the account, he or she will send an email to the NSSC Contact Center (NASA-SATERN.support@nasa.gov) requesting that the account be created. For those individuals that request an Administrator account directly from the Help Desk, he or she will be directed to the appropriate Discipline SAL for action.

For those requesting the View Discipline Items role to search and view Items, contact your Center SAL.

Support

As the SATERN Administrator community continues to work in SATERN, hold training courses, review business processes, and evaluate the system, there will be situations where a need for a business rule is identified. If you would like a situation considered by the SATERN EC or have functional issues or concerns, please contact your Center or Discipline SAL. SALs are listed on the SATERN Informational Web site (https://saterninfo.nasa.gov/key_contacts.html). SALs may contact the SATERN Agency Operational Support Lead to add their request to the EC agenda.

For technical support, Administrators and Users may call the SATERN Help Desk at 1-877-NSSC-123 (1-877-677-2123).

Administrators continue to have access to a SATERN training environment for self-paced exercises. The training environment remains valuable because it allows Administrators to identify and analyze changes to their business processes without making changes to the production system. The current SATERN training environments are located at the following Web addresses:

User: <https://nasatrn.gpehosting.com/plateau/user/login.jsp>

Administrator: <https://nasatrn.gpehosting.com/plateau/admin/login.jsp>

For access to either of these training environments, any Center Level 1 Administrator can create an account.

Also be sure to check out the SATERN Informational Web site at <https://saterninfo.nasa.gov> for more information for Users, Supervisors, and Administrators.



Acknowledgements

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Appendix A: STANDARD FORM 182 (SF-182)

REQUEST, AUTHORIZATION, AGREEMENT & CERTIFICATION OF TRAINING					
SECTION A: TRAINEE INFORMATION					
B. Record Action					
<input checked="" type="radio"/> Add					
A.1. Applicant's Name			First Five Letters of Last Name		
Last Name	First Name	Middle Initial	SMITH		
Smith	John	Q			
A.4. Home Address			*A.5. Work Phone		*A.6. Position Level
Street Address					<input type="radio"/> a. Non-supervisory <input type="radio"/> b. Manager
City	State / Province	Postal Code	Country	<input type="radio"/> c. Supervisory <input type="radio"/> d. Executive	
*A.7. Organization Mailing Address			*A.8. Work Fax		*A.9. Work Email Address
* Organization					
* Add1					
* City	* State / Province	* Postal Code			
*A.10. Position Title	A.11. Applicant Handicapped or Disabled		If yes, please describe below		
	<input type="radio"/> Yes <input checked="" type="radio"/> No				
A.12. Type Of Appointment	*A.13. Education Level		*A.14. Pay Plan	*A.15. Series	*A.16. Grade
SECTION B: TRAINING COURSE DATA					
B.1a. Name and Mailing Address of Training Vendor					
You may either search for, and select a vendor, or, manually enter in the vendor information.					
* <input checked="" type="radio"/> Name				<input type="radio"/> Other If Other, please specify	
* Street Address	* City	* State/Zip	* Vendor Fax	* Country	
B.1b. Location Of Training Site			<input type="checkbox"/> Same, mark box.		
* Street Address	* City	* State/Zip	* Vendor Fax	* Country	
			B.1c. Vendor Email Address		*B.1d. Vendor Telephone Number



* B.2a. Course Title		B.2b. Catalog/Course Number	* B.3. Training Start Date (MM/DD/YYYY)	* B.4. Training End Date (MM/DD/YYYY)	
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
* B.5. Training Duty Hours	* B.6. Training Non-Duty Hours		* B.7. Competency		
<input type="text"/>	<input type="text"/>		-- Please Select One --		
B.9. [TRAINING OFFICE] Training Type/Sub Type Code		B.10. [TRAINING OFFICE] Training Delivery Type Code		B.11. [TRAINING OFFICE] Training Designation Type Code	* B.12. Credit Hours (if academic credit, if not academic, then enter 0)
-- Please Select One --		-- Please Select One --		-- Please Select One --	<input type="text"/>
B.14. [TRAINING OFFICE] Training Accreditation Indicator		B.15. Continued Service Agreement Required Indicator		B.17. [TRAINING OFFICE] Training Source Type Code:	
<input checked="" type="radio"/> Yes <input type="radio"/> No		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A		<input type="text"/>	
* B.18. Course Objectives and Justification			B.19. Conference Code		
<input type="text"/>			<input type="text"/>		
SECTION C: COSTS AND BILLING INFORMATION					
C.1. Direct Cost and appropriation/fund chargeable			C.2. Indirect Cost and appropriation/fund chargeable		
Item	* Amount	Appropriation Fund	Item	* Amount	Appropriation Fund
a. Tuition	\$ <input type="text"/>	<input type="text"/>	a. Travel	\$ <input type="text"/>	<input type="text"/>
b. Books or Materials	\$ <input type="text"/>	<input type="text"/>	b. Per Diem	\$ <input type="text"/>	<input type="text"/>
c. Total	\$ <input type="text"/>		c. Total	\$ <input type="text"/>	
C.3. Total Training Non-Government Contribution Cost			* C.6. User Comments/Training Office Comments/Billing Instructions (Info about vendor/course website, registration forms if needed, etc.)		
\$ <input type="text"/>			<div></div>		
C.4. [TRAINING OFFICE] Document / Purchase Order / Requisition No					
<input type="text"/>					



Note: This agreement must be signed by the nominee for Government training that exceeds 80 hours (or such other designated period, less than 80 hours as prescribed by the agency) for which the Government approves payment of training costs prior to the commencement of such training. Nothing contained in this SAMPLE agreement below shall be construed as limiting the authority of an agency to waive, in whole or in part, an obligation of an employee to pay expenses incurred by the Government in connection with the training.

Continued Service Agreement

Employees, who are selected to training for more than a minimum period as prescribed in Title 5 USC 4108 and 5 CFR 410.309, see your supervisor for more information on the internal policies to implement a continued service agreement.

Employees Agreement to Continue in Service

To be completed by applicant:

1. I AGREE that, upon completion of the Government sponsored training described in this authorization, if I receive salary covering the training period, I will serve in the agency three (3) times the length of the training period. If I received no salary during the training period, I agree to serve the agency for a period equal to the length of training, but in no case less than one month. (The length of part-time training is the number of hours spent in class or with the instructor. The length of full-time training is eight hours for each day of training, up to a maximum of 40 hours a week).

NOTE: For the purposes of this agreement the term "agency" refers to the employing organization (such as an Executive Department or Independent Establishment), not to a segment of such organization.

2. If I voluntarily leave the agency before completing the period of service agreed to in item 1 above, I AGREE to reimburse the agency for fees, such as the tuition and related fees, travel, and other special expenses (EXCLUDING SALARY) paid in connection with my training. These fees are reflected in Section C Costs and Billing Information. Note: Additional information about fees and expenses can be found in the Guide to Human Resource Reporting (GHRR). <http://www.opm.gov/feddata/ghrr/index.asp>
3. I FURTHER AGREE that, if I voluntarily leave the agency to enter the service of another Federal agency or other organization in any branch of the Government before completing the period of service agreed, I will give my organization written notice of at least ten working days during which time a determination concerning reimbursement will be made. If I fail to give this advance notice, I AGREE to pay the full amount of additional expenses 5 U.S.C. 4108 (a) (2) incurred by the Government in this training.
4. I understand that any amount of money which may be due to the agency as a result of any failure on my part to meet the terms of this agreement may be withheld from any monies owed me by the Government, or may be recovered by such other methods as are approved by law.

5. I FURTHER AGREE to obtain approval from my organization and the person responsible for authorizing government training requests of any proposed change in my approved training program involving course and schedule changes, withdrawals or incompletions, and increased costs. I acknowledge that this agreement does not in any way commit the Government to continue my employment. I understand that if there is a transfer of my service obligation to another Federal agency or other organization in any branch of the Government, the agreements will remain in effect until I have completed my obligated service with that other agency or organization.
6. I acknowledge that this agreement does not in any way commit the Government to continue my employment. I understand that if there is a transfer of my service obligation to another Federal agency or other organization in any branch of the Government, the agreements will remain in effect until I have completed my obligated service with that other agency or organization.

- Period of obligated Service: _____
- Employee's Signature: _____
- Date: _____

Validation Error

You must correct the following error(s) before proceeding:

- One or more steps do not have an approver. Please choose an approver before submitting the request.

Approval Submission

Submit for Approval

< Back



The item/request selected requires approval using the steps listed below.

Any step that do not have a user listed must have a name filled in before the request can be submitted.

Approval Step	Approvers
Initial Approval	Select User for Approval
Training Coordinator	TRAINING COORDINATOR (Show All)
Training Office	TRAINING OFFICE (Show All)
NSSC Procurement	NSSC PROC (Show All)



Verification Form

REQUEST, AUTHORIZATION, AGREEMENT & CERTIFICATION OF TRAINING	
* V.1. Course Was Completed	
<input checked="" type="radio"/> Yes	V.2. Comments/Explanation
<input type="radio"/> No	<input type="text"/>
V.3. Actual Course Dates (MonthDayYear) (MM/DD/YYYY)	
a. Commenced:	<input type="text" value="12/6/2009"/> 
b. Complete:	<input type="text" value="12/6/2009"/> 
V.5. Academic Score	
<input type="text"/>	
V.6. All sessions were attended	
<input checked="" type="radio"/> Yes	V.7. Comments/Explanation
<input type="radio"/> No	<input type="text"/>

Submit



Appendix B: SATERN Mandatory Fields

Item Mandatory Fields

- **Title**
- **Approval Process ID** (Only if approval is required)
- **Approval Required** (Only if Approval Process ID is populated)
- **Description** (Only for Items that will go into a catalog)
- **Subject Area** (Only for Items that will go into a catalog)

Items

- Scheduled Offerings
- Classes
- Group Instances
- Curricula
- Requirements
- Questionnaire Surveys
- Communities
- Tasks
- + Resources
- + Tools
- + References

Next

Enter the basic description of your item below. The **Design Data** categories allow you to specify how users will get credit for completing this item. If you associate your item with one or more **Subject Areas**, users will be able to quickly locate your item in their catalogs.

* = Required Fields

Summary

* Item Type:

* Item ID:

* Revision Date: 1/4/2010

* Revision Time: 07:58 AM

Revision Number: 1

Description:

Design Data

Contact Hours: (1000)

Credit Hours: (1000)

CPEs: (1000)

Subject Areas

Enter Subject Area ID or [add one or more from list](#)

Subject Area ID: **Add**

Approval Process:

☐ Approval Required

* Domain ID: PUBLIC



Item Mandatory Field

- Segment Description

Items
Scheduled Offerings
Classes
Group Instances
Curricula
Requirements
Questionnaire Surveys
Communities
Tasks
+ Resources
+ Tools
+ References

Add New Learning Item | Help

Enter Description > **Specify Delivery Data** > Add Online Content > Add to Catalog > Review and Save

Previous

Next

Use this page to specify the duration and spacing of the various segments of an instructor-led item. If there is more than one segment (e.g., a morning segment and an afternoon segment), enter the information for each segment and the **Offset** which is the number of minutes between segments. You do not have to enter an **Offset** after the last segment or the last segment on a day.

If this is not an instructor-led item, click **Next**.

* = Required Fields

Title: SATERN Item Mandatory Fields
Item ID: COURSE GRC-SCREENPRINT 1/4/2010

Item Segments

Add Segments to your item.

Description:
Day 1

* Day: (1000) 1

* Duration: (1000) 4.00 hours

Offset: (1000) hours

Location Type:

Add

Reset

Item Mandatory Fields

- Catalog Id (Only for Items that will go into a catalog)

Items
Scheduled Offerings
Classes
Group Instances
Curricula
Requirements
Questionnaire Surveys
Communities
Tasks
+ Resources
+ Tools
+ References

Add New Learning Item | Help

Enter Description > Specify Delivery Data > Add Online Content > **Add to Catalog** > Review and Save

Previous

Next

Placing your item in a catalog(s) makes it available to users who have access to that catalog(s). Consider adding a **Flag** to your catalog item description (e.g., New) to give users more information about the item. If you add a **Flag**, you should also indicate the date at which that flag will be removed and the reason it will be removed. Also indicate the date on which your item **Expires** so that it can be deleted from the catalog.

If you are not placing your item in a catalog, click **Next**.

Title: SATERN Item Mandatory Fields
Item ID: COURSE GRC-SCREENPRINT 1/4/2010

Catalogs

Enter Catalog ID or [add one or more from list](#)

Catalog ID:

Add

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Item Mandatory Fields

- **Source ID** (Internal/External)
- **Delivery Method**
- **Assignment Type ID** (Only if the Item is Mandatory, e.g., Ethics, Security)
- **Approval Process ID** (If not filled out through the Add New Item wizard and only if approval is required)
- **Approval Required** (If not filled out through the Add New Item wizard and only if Approval Process ID is populated)

Items

- Scheduled Offerings
- Classes
- Group Instances
- Curricula
- Requirements
- Questionnaire Surveys
- Communities
- Tasks
- + Resources
- + Tools
- + References

[Standard Options](#)

Cost Calculation	Pricing	Chargeback	Catalogs	Subject Areas	Evaluations
Substitutes	Online Settings	Notifications	Materials	Objectives	Grading Options
Tasks	Curricula	Competencies	Custom Fields	Requests	Rqst Reasons
Summary	Design Data	Delivery Data	Instructors	Prerequisites	Documents

Edit the Item

Apply Changes | Revise... | Reset | Copy Item... | Schedule | Delete

* = Required Fields

Title: SATERN Item Mandatory Fields

Classification: Instructor-Led

Source ID: [Dropdown]

* Domain ID: GBC

Delivery Method ID: [Dropdown]

Assign. Type ID: [Dropdown]

Approval Process ID: [Dropdown]

Approval Required: ☐



Item Mandatory Fields

- **Contact Hours** (If not filled in through Add New Item wizard; online courses and internal items only)
- **Audience** (Only for Items that will go into a catalog)
- **Contact's Email**

Items

- Scheduled Offerings
- Classes
- Group Instances
- Curricula
- Requirements
- Questionnaire Surveys
- Communities
- Tasks
- + Resources
- + Tools
- + References

Cost Calculation	Pricing	Chargeback	Catalogs	Subject Areas	Evaluations
Substitutes	Online Settings	Notifications	Materials	Objectives	Grading Options
Tasks	Curricula	Competencies	Custom Fields	Requests	Rqst Reasons
Summary	Design Data	Delivery Data	Instructors	Prerequisites	Documents

Edit the Design Data for the Item

Apply Changes Reset

Reviser:

Approved By:

Approval Date: (MM/DD/YYYY)

Lesson:

Audience:

Default Initial Assignments:

Initial Number: (1000,001) Initial Period: Days

Initial Basis: ☐ Calendar ☒ Event

Default Retraining Assignments:

Retraining Number: (1000,001) Retraining Period: Days

Retraining Basis: ☐ Calendar ☒ Event

Contact's Email:

Contact Hours: (1000)

Credit Hours: (1000)

CPE Hours: (1000)

Item Mandatory Fields

- **Subject Area** (If not filled in through Add New Item wizard and only for Items that will go into a catalog)

Tools

- + Tools
- + References

Cost Calculation	Pricing	Chargeback	Catalogs	Subject Areas	Evaluations
Substitutes	Online Settings	Notifications	Materials	Objectives	Grading Options
Tasks	Curricula	Competencies	Custom Fields	Requests	Rqst Reasons
Summary	Design Data	Delivery Data	Instructors	Prerequisites	Documents

Edit Subject Areas for the Item

Add a Subject Area to an Item

Enter Subject Area ID or add one or more from list

Subject Area ID:

Add



Item Mandatory Fields

- **Minimum Registration** (Highly recommended for Item request APM)
- **Segment** (If not filled in through Add New Item wizard)

Items

Scheduled Offerings

Classes

Group Instances

Curricula

Requirements

Questionnaire Surveys

Communities

Tasks

+ Resources

+ Tools

+ References

Cost Calculation

Pricing

Chargeback

Catalogs

Subject Areas

Evaluations

Substitutes

Online Settings

Notifications

Materials

Objectives

Grading Options

Tasks

Curricula

Competencies

Custom Fields

Requests

Rqst Reasons

Summary

Design Data

Delivery Data

Instructors

Prerequisites

Documents

Edit the Delivery Data for the Item

Schedule

Update the Delivery Data for the Item

Length:
(1000)

4.00

Prep Time:
(1000)

Minimum Registration:
(1000)

Max Registration:
(1000)

Self Registration:

☒

Apply Changes

Reset

Add a Default Segment to the Item

Seg#	Segment	Day (1000) Duration (1000)	Offset (1000)	Location Type
2		2 8.00		

Add



Item Custom Fields Mandatory Fields

Refer to *Appendix C: Acceptable Codes for Custom Fields* for the Data Definition Table

- **Type of Training Sub-Code**
- **Source of Training**
- **Academic Credit Code**
- **Training Credit Code**
- **Direct Cost Code**
- **Indirect Cost Code** (Not required, but if the cost code is No Cost, then code must be zero)
- **Metrics That Matter**
- **Training Vendor** (Required for ILT courses - not required for on-line courses but highly recommended)
- **Center-specific** (Refer to your Center's guidelines): PO Number, Category, Sub-Category, Funding Organization, POC, and Budget Line items.

Items

- Scheduled Offerings
- Classes
- Group Instances
- Curricula
- Requirements
- Questionnaire Surveys
- Communities
- Tasks
- + Resources
- + Tools
- + References

Apply Changes Reset

Column Number	Label	Value
5	Type of Training Sub-Code	<input type="text"/>
6	Source of Training	<input type="text"/>
8	Academic Credit Code	<input type="text"/>
9	Training Credit Type Code	<input type="text"/>
10	Direct Cost Code	<input type="text"/>
14	Indirect Cost Code	<input type="text"/>
17	PO Number	<input type="text"/>
18	Category Code	<input type="text"/>
19	Sub Category Code	<input type="text"/>
20	Funding Organization	<input type="text"/>
21	POC	<input type="text"/>
22	Budget Line Item	<input type="text"/>
23	Metrics That Matter (MTM)	<input type="text"/>
24	P/PM RE-CERTIFICATION	<input type="text"/>
25	Training Vendor (ORG ID)	<input type="text"/>



Scheduled Offering Mandatory Fields

- Facility
- Primary Instructor (Only if using MTM)
- Location

Items

Scheduled Offerings

Classes

Group Instances

Curricula

Requirements

Questionnaire Surveys

Communities

Tasks

+ Resources

+ Tools

+ References

1. Select a Type

☒ Item ☐ Activity

2. Identify the Scheduled Offering

* Item Type:

* Item ID:

Title:

Description:

* Domain:

Facility:

3. Set Up the Segment

* Start Date: (MM/DD/YYYY)

* Start Time: (hh:mm AM/PM)

* Time Zone:

4. Select Resources

Primary Instructor:

Primary Location:

Equipment:

Refresh

Scheduled Offering Mandatory Fields

- Related Catalog (Only if Scheduled Offering will go into a catalog)

Items

Scheduled Offerings

Classes

Group Instances

Curricula

Requirements

Questionnaire Surveys

Communities

Tasks

+ Resources

+ Tools

+ References

Add New Scheduled Offering

Initial Details > **Publish** > Confirm

Help

Previous Next

Select the **Catalogs** that should display the **Scheduled Offering** to users. Catalogs are used to determine which users see what scheduled offering. You will select only from the list of catalogs that contain the item that you are scheduling.

Title: SATERN Mandatory Fields

Description:

Delivery Dates: 1/25/2010 08:00 AM - 1/25/2010 12:00 PM

Related Catalog

Add

Previous Next

Rules and Process Guide for Administrators

Page 57



Scheduled Offering Mandatory Fields

- **Facility** (If not entered during the Add New Scheduled Offering wizard)
- **Approval Process ID** (Only if approval is required)
- **Approval Required** (Only if Approval Process ID is populated)
- **Contact**
- **Email**
- **Phone**
- **Fax**
- **Center-specific** (Refer to your Center's guidelines): PO Number, Category, Sub-Category, Funding Organization, POC, and Budget Line items.

Scheduled Offerings

Classes
Group Instances
Curricula
Requirements
Questionnaire Surveys
Communities
Tasks
+ Resources
+ Tools
+ References

* = Required Fields

Apply Changes Reset Copy Scheduled Offering... Delete

Description:

Group Instance:

* Domain:

Facility:

* Time Zone: ☒ Show in this Time Zone

Approval Process ID:

Approval Required: ☐

Contact:

Email:

Phone:

Fax:

Active: ☒

Auto Fill Registration: ☐

Enable Users to Waitlist: ☒

Comments:

Scheduled Offering Mandatory Fields

- **Primary Instructor** (Mandatory for MTM use - otherwise highly recommended or Center Mandatory)
- **Primary Location**

Scheduled Offerings

Items
Classes
Group Instances
Curricula
Requirements
Questionnaire Surveys
Communities
Tasks
+ Resources
+ Tools
+ References

Notifications Cost Calculation Cost Summary Pricing Catalog Chargeback

Summary Segments Registration Contacts Materials Custom Fields

Edit the Scheduled Offering

* = Required Fields

Add a Segment to the Scheduled Offering

* Start Date: (MM/DD/YYYY) * End Date: (MM/DD/YYYY)

* Start Time: (hh:mm AM/PM) * End Time: (hh:mm AM/PM)

* Time Zone:

Primary Instructor: Primary Location:

Segment Description:



Scheduled Offering Mandatory Fields

- Source of Training
- Direct Cost Code
- Indirect Cost Code (Not required, but if the cost code is No Cost, then code must be zero)
- Training Vendor

Tasks
+ Resources
+ Tools
+ References

[Standard Options](#)

Notifications	Cost Calculation	Cost Summary	Pricing	Catalog	Chargeback
Summary	Segments	Registration	Contacts	Materials	Custom Fields

Edit the Custom Fields for the Scheduled Offering

Apply Changes Reset

Column	Label	Value
6	Source of Training	<input type="text"/>
10	Direct Cost Code	<input type="text"/>
14	Indirect Cost Code	<input type="text"/>
17	PO Number	<input type="text"/>
20	Funding Organization	<input type="text"/>
21	POC	<input type="text"/>
22	Budget Line Item	<input type="text"/>
25	Training Vendor (ORG ID)	<input type="text"/>

Learning Event Recorder Mandatory Fields

- Instructor (required if MTM is being used – otherwise highly recommended or Center Mandatory)
- Total Hours (Pre-populated from Segments)
- Credit Hours (Pre-populated from the Design Data)

Regions
- Tools
- **Learning Event Recorder**
- Learning Event Editor
- Merge Users
- Send Notifications
- Supervisor Assistant
- Learner Needs Mgmt
+ References

Item: COURSE GRC-SCREENPRINT (Rev 1 - 1/4/2010 07:58 AM EST)
Title: SATERN Mandatory Fields

Instructor:

Default Grade:

* Default Completion Status:

* Completion Date: (MM/DD/YYYY)

* Completion Time: (hh:mm AM/PM)

* Time Zone: EST (Eastern Standard Time)

Default Price (\$): (1000)

Currency ID: US Dollar (USD)

Total Hours: (1000)

Credit Hours: (1000)

Contact Hours: (1000)

CPE: (1000)



Catalog Mandatory Fields

• Description

Learner Management | Performance | Learning | **Commerce** | Content | Reports | System Admin

Catalogs Search | [Add New](#) | [Help](#) |

> [Add New](#)

Add Catalog

* = Required Fields

* Catalog ID:

Description:

* Domain:

Pricing Rule:

Contact Email:

Active: ☒

[Add](#) [Reset](#)

Curricula Mandatory Fields

• Title

Learner Management | Performance | **Learning** | Commerce | Content | Reports | System Admin

Curricula Search | [Add New](#) | [Help](#) |

> [Add New](#)

Add New Curriculum

* = Required Fields

[Add](#) [Reset](#)

* Curriculum ID:

Title:

Description:

Creation Date:

Active: ☒

* Domain:

Curriculum Type:

Force Incomplete: ☐

[Add](#) [Reset](#)



Locations Mandatory Fields

- Description
- Location Type
- Facility

Learner Management | Performance | Learning | Commerce | Content | Reports | System Admin

Items
Scheduled Offerings
Classes
Group Instances
Curricula
Requirements
Questionnaire Surveys
Communities
Tasks
Resources
- Instructors
- Equipment
- Materials
- Facilities
Locations
- Custom Resources
+ Tools
+ References

Locations Search | [Add New](#) | [Help](#) |

> [Add New](#)

Add New Location

* = Required Fields

* Location ID:

Description:

* Domain:

Location Type:

Facility:

Max Capacity:

Contact Name:

Contact Email:

Comments:



Appendix C: Acceptable Codes for Custom Fields

Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code		Two character numeric code used in conjunction with the Type of Training code	EHRI Data Element
	01-01	Indicates principal subject matter and emphasis of the training Legal	Refers to subject matter of training, not the position of person trained. <u>01 - Training Program Area</u>
	01-02	Education or training in the concepts, principles, theories, or techniques of law. Medical and Health	Functional or specialized training programs <u>02 -Developmental Training Program Area</u>
	01-03	Education or training in the concepts, principles, theories, or techniques of medicine. Scientific	Formal developmental/training programs <u>03 -Basic Training Area</u>
	01-04	Education or training in the concepts, principles, theories, or techniques of disciplines such as the physical, biological, natural, social sciences; education; economics; mathematics; or statistics. Engineering and Architecture	Fundamental and/or required training programs
		Education or training in the concepts, principles, theories, or techniques of such as architecture and engineering.	



Data Element	Acceptable Codes	Description & Definition	Guidelines
	01-05	Human Resources Education or training in the concepts, principles, theories of such fields as public administration; personnel; training; equal employment opportunity; human resources policy analysis; succession planning; performance management; classification; and staffing.	
	01-06	Budget/Finance Business Administration Education or training in the concepts, principles, theories of business administration, accounts payable and receivable; auditing and internal control; and cash management.	
	01-07	Planning and Analysis Education or training in the concepts, principles, theories of systems analysis; policy, program or management analysis; or planning, including strategic planning.	
	01-08	Information Technology Education and training in the concepts and application of data and the processing thereof; i.e., the automatic acquisition, storage, manipulation (including transformation), management, system analysis, movement, control, display, switching, transmission or reception of data, computer security and the development and use of the hardware, software, firmware, and procedures associated with this processing. This training type does not include any IT training on Agency proprietary system.	



Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code (Continued)	01-09	<p>Project Management</p> <p>Education and training in the concepts, principles, theories necessary to develop, modify, or enhance a product, service, or system which is constrained by the relationships among scope, resources, and time.</p>	
	01-10	<p>Acquisition</p> <p>Education or training in the concepts, principles, theories or techniques related to the 1102 occupation.</p>	
	01-11	<p>Logistic Specialty</p> <p>Training for professional skills of a specialized nature in the methods and techniques of such fields as supply, procurement, transportation, or air traffic control.</p>	
	01-12	<p>Safety and Security</p> <p>Training of a specialized nature in the methods and techniques of investigation, physical security, personal security, and police science.</p>	
	01-13	<p>Clerical (Non-supervisory clerical/administrative)</p> <p>Training in skills such as office management, typing, shorthand, computer operating, letter writing, telephone techniques, or word processing.</p>	



Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code (Continued)	01-14	Trade and Craft Training in the knowledge, skills, and abilities needed in such fields as electronic equipment installation, maintenance, or repair; tool and die making; welding, and carpentry.	
	01-15	Foreign Affairs Training for professional skills of a specialized nature in the methods and techniques of such fields as foreign languages, foreign culture, diplomacy, strategic studies.	
	01-16	Leadership/Manager/Communications Courses Training that address skill area such as Leadership/Management and Communication (i.e., written, oral and interpersonal) coursework.	
	01-17	Reserved for future use	
	01-18	Reserved for future use	
	01-19	Reserved for future uses	
	02-20	Pre-supervisory Program Development/training program for non-supervisors	



Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code (Continued)	02-21	<p>Supervisory Program</p> <p>Development/training program which provides education or training in supervisory and techniques in such subjects as personnel policies and practices (including equal employment opportunity, merit promotion, and labor relations); human behavior and motivation, communication processes in supervision, work planning, scheduling, and review; and performance evaluation for first line supervisors.</p>	
	02-22	<p>Management Program</p> <p>Development/training program which provides mid management level education or training in the concepts, principles, and theories of such subject matters as public policy formulation and implementation, management principles and practices, quantitative approaches to management, or management planning organizing and controlling. (Supervisors of supervisors; GS-14/15 supervisors; GS-14/15 direct reports to SES).</p>	
	02-23	<p>Leadership Development Program</p> <p>Formal developmental program that provide leadership training and development opportunities.</p>	
	02-24	<p>SES Candidate Development</p> <p>OPM-approved program to prepare potential SES members.</p>	



Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code (Continued)	02-25	Executive Development Continuing development for leaders above the GS-15 level.	
	02-26	Mentoring Program Formal stand alone program with established goals, measured outcomes, access open to all who qualify, protégées and mentors paired to facilitate compatibility, training and support provided, company benefits directly.	
	02-27	Coaching Program Formal stand alone which provides ongoing partnership with an employee and coach that helps employee produce desired results in professional lives.	
	02-28	Reserved for future use	
	02-29	Reserved for future uses	
	03-30	Employee Orientation Training of a general nature to provide an understanding of the organization and missions the Federal Government, or the employing Agency or activity, or a broad overview and understanding of matters of public policy.	
	03-31	Adult Basic Education Education or training to provide basic completeness in such subjects as remedial reading, grammar, arithmetic, lip reading or Braille.	



Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code (Continued)	03-32	Mandated Training Mandatory training for all employees Government wide. This includes training required by law and/or regulation; such as ethics, information system awareness, safety, or health.	
	03-33	Work-life Training to promote worklife (e.g., health and wellness training, employee retirement/benefits training, etc).	
	03-34	Soft Skills Training involving development of employees' ability to relate to others (i.e., customer service, effective communication, dealing with difficult people, etc.).	
	03-35	Agency Specific Agency specific required training that is not addressed in Training Program Type 01. This training type does include IT training on Agency proprietary system.	
	03-36	Basic Computer Training	
	03-37 thru 03-39	Reserved for future use	
Source of Training	01-05	Two-digit alpha-numeric code used to indicate the source of the training.	
	01	Government - Internal Training provided by a Federal department, Agency, or independent establishment for its own employees.	



Data Element	Acceptable Codes	Description & Definition	Guidelines
Source of Training (Continued)	02	Government – External Training provided by an inter-Agency training activity, or a Federal department, Agency, or independent establishment other than the one which currently employs the trainee.	
	03	Non-governmental Sources include commercial or industrial concern, educational institutions, professional societies or associations, consultants or individuals who are not government employees, but are contracted to develop and/or provide training course or program.	
	04	Government State/Local Training provided by a State, county or municipal government except education provided by State-operated or other public educational institution which is reported as non-government	
	05	Foreign Governments and Organizations Training provided by non United States entities which may or may not be outside the United States	
Academic Credit Code	01-05	Two digit numeric field indicating the type of academic training.	
	01	Undergraduate Academic Credit	
	02	Graduate Academic Credit	
	03	Continuing Education Credit	



Data Element	Acceptable Codes	Description & Definition	Guidelines
Academic Credit Code (Continued)	04 05	Post Graduate Credit NA	
Training Credit Type Code	01-03 01 02 03	Two digit numeric code indicating the credit type. Semester Hours Quarter Hours Continuing Education Unit	Set to 03 if no other value is appropriate.
Direct Cost Code	 A B C D 0	One digit alpha-numeric field used to indicate if the direct cost of a course was an individual or contract course and whether it was funded by the Agency or installation. Individual - funded by Center Individual - funded by Agency Contract - funded by Center Contract - funded by Agency No Direct Cost	 If there is no Tuition, Books & Materials, or Other Direct Costs, then On-duty hours must be at least 1.
Indirect Cost Code	 A B 0	One digit alpha-numeric field used to indicate if the indirect cost (travel/per diem) related to a course was funded by the Agency or installation. Individual - funded by Center Individual - Funded by Agency No Indirect Cost	 Not required, but if the cost code is No Cost, then code must be zero.



Data Element	Acceptable Codes	Description & Definition	Guidelines
PO Number	Blank or Free text	Purchase Order Number assigned to transaction	
Category Code	See Regional Administrator for acceptable codes	Alpha-numeric code used to further categorize Type of Training	Each Center has discretion on how to use this field
Sub Category Code	See Regional Administrator for acceptable codes	Alpha-numeric code used to further sub-categorize Category Code further	Each Center has discretion on how to use this field
Funding Organization	See Regional Administrator for acceptable codes	Alpha- numeric code used to identify which organization is funding a course.	Each Center has discretion on how to use this field
POC (Point of Contact)	See Regional Administrator for acceptable codes	Alpha-numeric code used to identify the Training Office personnel responsible for the administration of the course or training application.	Each Center has discretion on how to use this field.
MTM	Y or N	Indicates whether Metrics that Matter was used for this Item	
Training Vendor	Free Form Text field	Free Form Text field used to Identify Vendor providing course.	Mandatory for Internal Items



Type of Training Mandatory Codes	Type of Training Sub Code Mandatory Codes									
	01 Legal	02 Medical and Health	03 Scientific	04 Engineering Architecture	05 Human Resources	06 Budget Finance Business Admin.	07 Planning & Analysis	08 Info Technology	09 Project Management	
01 Training Program Area	10 Acquisition	11 Logistic Specialty	12 Safety and Security	13 Non- Supervisory Clerical	14 Trade and Craft	15 Foreign Affairs	16 Ldrship/Mgr. Communication	17 Reserved future use	18 Reserved future use	19 Reserved future use
02 Developme ntal Training Program Area	20 Pre- Supervisory Program	21 Supervisory Program	22 Management Program	23 Leadership Development Program	24 SES Candidate Program	25 Executive Development	26 Mentoring Program	27 Coaching Program	28 Reserved future use	29 Reserved future use
03 Basic Training Area	30 Employee Orientation	31 Adult Basic Education	32 Mandated Training	33 Work-Life	34 Soft Skills	35 Agency Specific	36 Basic Computer Training	37 Reserved future use	38 Reserved future use	39 Reserved future use



Appendix D: Glossary

Administrator – An individual that has an assigned role and responsibility in SATERN to manage system data.

Assignment Profile – Assignment Profiles associate Curricula, Domains and Competency Profiles to Users based on the multiple attributes of the Users. It is similar to job positions, but it offers more criteria to filter Users. Users whose attributes (such as Domain, match those of the Assignment Profile are automatically assigned the curricula and the proficiency profiles associated with the respective Assignment Profile.

Assignment Type – Identifies the Item priority on a User's Learning Plan. Examples: Optional, Required.

Basis Date – A component of the Calendar-based Curriculum set-up, the Basis Date (defined for each Curriculum) defines the beginning point of the time-periods.

Calendar Basis – Allows the Admin to define calendar periods using the Basis Date. Users must complete the Items before the end of the first full interval.

Catalog – The listing of available Items and Scheduled Offerings that Users view and assign.

Completion Status – Indicates the successful, or unsuccessful, completion of an Item or Scheduled Offering (e.g. Passed, Failed, etc).

Curriculum – A group of one or more Items that Admins, Users, or Plateau Learning assign to Users and track as a group.

Domain – A data 'location' that determines Admin ownership. Domains are used to control all records, including Users in the database.

Domain Restriction – A record that determines in which Domains an Administrator may perform assigned workflows.

Effective Date – Identifies when the Curriculum status changes to "Incomplete" if the User does not complete the Item. This is equivalent to a "Grace Period."

Event Basis – Based on a straight timeline from the assignment or completion of an Item within a Curriculum.

Force Credit – The default value when you add an Item to the list of Items granting Substitute for the selected Item is No. This means that Substitute will only be granted to a User under this Substitute relationship if the Item that is currently being viewed in the Items section is actually included in the User's Learning Plan. If you



opt to Force Credit, then a separate Learning Event is recorded in the User's Learning History for the selected Item when the Item granting Substitute is successfully completed.

Force Incomplete – When you enable the "Force Incomplete" option for a Curriculum Item, the system will calculate whether the status should be complete or incomplete based on the User's latest attempt at completing the Item. If the User's latest attempt is incomplete, the system will calculate the expiration and required dates based on the date/time of the last unsuccessful attempt. When a Curriculum contains more than one Item and the Force Incomplete option is checked for the Curriculum, then the Curriculum will remain Incomplete until ALL the included Items are successfully completed.

Item – An assignable unit that Plateau Learning tracks and records completion. Items are usually learning-related such as an Instructor-led course or online training.

Item Classification –

- *Online* – the Item is entirely Online Content.
- *Instructor-Led* – the Item is Instructor-led. Blended Learning is not a separate Item Classification, but Instructor-led training with Online Content.
- *Other* – the Item is a physical object (e.g. book, video cassette, etc.).

Learning Event – A User's participation, completion, or attempted completion of an Item. This record, located under Learning History, contains the Completion Status, the completion/attempt date, and additional information.

Learning History – a detailed list of recorded Learning Events for a User.

Learning Plan – a "to-do" list of assigned Items for a User. It also includes the Required Date for each Item.

Notification – system generated emails sent to User, Supervisors, and/or Instructors.

Online Content – training content that the User launches from the Plateau Learning application (e.g. HTML pages, Flash movies, Word Documents, etc.).

Prerequisite – an Item the User must complete before he/she can self-register for a Scheduled Offering or launch an Online Item.

Required Date – the due date of an Item.

Retraining Interval – the number of days before a User must successfully complete an Item again.



SATERN – a web based software package that manages employee learning and training.

Scheduled Offering – an Instructor-led or Blended Learning Item with a scheduled date and time.

Segment – a block of instruction within a Scheduled Offering. Scheduled Offerings must contain at least one Segment.

Sub Curriculum – a Curriculum assigned to a parent Curriculum.

Subject Areas – Categories that are associated with Items (used to "Browse" the Catalog)

Substitute – an Item that, upon successful completion, provides credit for another Item.

Subordinates – a User that has a specified Supervisor.

Supervisor – a User that oversees the learning of one or more Users.

User – A database record that represents an employee (also referred to as Learner).

Appendix E: User Reference Code Values

1. UUPIC – Universal Uniform Personal Identification Code

Source: [NASA Security Procedures Requirement \(NSPR 1600-1\)](#)

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
9 digit unique number	UUPIC	Universal Uniform Personal Identification Code – Replaces SSN

2. Duty Status

Source: FPPS

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
A	ACTIVE	
C	CAREER-SEASONAL	
D	DEATH	
F	FECA	
I	IPA 50% REIMBURSED	
L	LWOP/FURLOUGH/SUSPENSION	
M	MILITARY FURLOUGH	
N	SEPARATIONS-RIF/IN LIEU OF ADV ACT	
P	IN PROGRESS	
Q	SEPARATIONS-QUITS	
R	SEPARATIONS-RETIREMENT	
S	SEPARATIONS-INTERNATIONAL ORG/IPA	
U	SEPARATIONS- RSGN/TERM/DSCHG/RMV	
V	CASUAL/ACTIVE	
W	CASUAL/INACTIVE	
Y	ACTIVE YCC ENROLLEE	
Z	SEPARATED YCC ENROLLEE	



3. Ethnic Origin

Note: This data standard is only applicable to an employee whose employment occurred prior to July 1, 2006. See the Ethnicity and Race Identification data standard for an employee whose employment occurs on or after January 1, 2006.

Source: The CPDF Guide to Personnel Data Standards, <http://www.opm.gov/feddata/guidance.asp>

4. Handicap code

Source: The CPDF Guide to Personnel Data Standards, <http://www.opm.gov/feddata/guidance.asp>

5. Veterans Preference

Source: The CPDF Guide to Personnel Data Standards, <http://www.opm.gov/feddata/guidance.asp>

6. NASA Class Code

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
10000	Wage Grade	
20001	Pending Classification	
20101	General Engineer	
20201	Safety Engineer	
20301	Fire Prevention Engineer	
20501	Materials Engineer	
20602	Landscape Engineer	
20701	Civil Engineer	
20702	Structural Engineer	
21001	Environmental Engineer	
21101	Mechanical Engineer	
21401	Electrical Engineer	
21501	Electronics Engineer	
21601	Naval Engineer	
21701	Chemical Engineer	
21901	Industrial Engineer	
22001	Aerospace Engineer	
25001	Health Physicist	
25101	Physicist	
25201	Chemist	



25301	Metallurgist
25401	Meteorologist
27001	Mathematician
27101	Mathematical Statistician
27102	Computer Scientist
27201	Statistician
27301	Operations Research Analyst
28101	Agronomist
28201	Cartographer
28301	Geographer
28501	Photographic Technologist
29500	Expert
29600	Consultant
29999	Graduate Coop Student
30001	Pending Classification
30101	Engineering Aid
30102	Architectural Technician
30103	Civil Engineering Technician
30104	Chemical Engineering Tech
30105	Mining Engineering Tech
30106	Electrical Engineering Tech
30107	Engineering Technician
30108	Materials Engineering Tech
30109	Mechanical Eng Technician
30110	Nuclear Engineering Tech
30111	Naval Architectural Tech
30112	Industrial Engineering Tech
30113	Aerospace Engineering Tech
30114	Industrial Engineering Aid
30115	Petroleum Engineering Aid
30116	Biomedical Eng Tech
30117	Student Trainee (Eng Aid)
30501	Electronic Technician
31001	Engineering Drafting
31501	Equip Spec – Electrical
31502	Equipment Specialist
31503	Equip Spec – Machinery
31504	Equipment Spec – Prec. Instrs.



31505	Equip Spec – Air Prop. Sys.
31506	Equip Spec – Electronic
31507	Equip Spec – Automotive
31508	Equip Spec – Machine
32001	Mathematics Techn/Aid
32002	Mathematics Aid
32501	Physical Science Aid
32502	Physical Sci Technician
33001	Meteorological Technician
33101	Bil Lab Technician
33102	Biological Aid/Tech
33103	Agri Research Tech
33201	Cartographic Tech Photo
33202	Surveying Technician
33301	Health Aid Technician
33501	Safety Technician/Supv
33702	Dental Aid/Assistant
33703	Med Machine Aid/Tech
33801	Medical Aid/Technician
34001	Student Trainee – General
34002	Student Trainee – Soc. Sci
34003	Student Trainee – Bio. Sci.
34004	Student Trainee – Engineer
34005	Student Trainee – Phy. Sci.
34006	Student Trainee – Math Sci.
34007	Stu Trainee (Qual. Assur)
34008	Stu Trainee (Med & Health)
34501	Illustrator
34502	Illustrator – Scientific
34503	Illustrator – Tech Equip.
35001	Photographer
35002	Photographer – Still
35003	Photographer – Laboratory
35004	Photographer – Motion Pict.
35005	Photographer – Sci. & Tech.
35006	Photographic Officer
35007	Photographic Aid
35008	



35008	Photographic Aid - Trainee
35009	Stu Trainee (Photography)
35501	Quality Assurance
35502	Qual Assur – Aerospace
35503	Qual Assur – Electrical
35504	Qual Assur – Electronic
35505	Qual Assur – Mechanical
35506	Qual Assur – Materials
35507	Qual Assur – Chemical
35508	Qual Assur – Preserv:Pack
35509	Qual Assur – Metrology
35510	Qual Assur - Process
36001	Construction Inspection
36202	Miscellaneous Inspection
36301	Fire Protect & Prevent
36401	Guard Service
36502	Telecommunications Spec
37001	Facility Management Group
37501	Facility Maint Group
37502	
38001	Production Controller
39001	Ship Surveying
39002	Marine Cargo
39003	Packing
39004	Steward
39005	Gen Housekeeping
39006	Aviation Safety Officer
39007	FLT Sysms Safety SP/OFF
39008	Aircrew Technician Series
39999	
50001	Pending Classification
50002	Stu Trainee (Ofc Support)
50201	Messenger
50301	Receptionist
50401	Mail and File Clerk
50402	Mail Clerk
50403	File Clerk
50	



50501	Correspondence Clerk
50701	Stu Trainee (Education)
51001	Personnel Clerk/Assistant
51002	Discrim Compl Pro Asst/TP
51003	Security Clerk (Typing)
51004	Program Analysis Asst
51005	Resources Asst
51006	Equal Opportunity Asst
51007	Student Trainee - Personnel
51008	Stu Trainee (Public Affrs)
51009	Stu Trainee (Resources)
51010	Program Support Asst
51011	Security Clerk/Assistant
51101	Printing Clerk
51201	Clerk – Translator
51202	Sign Language Aid
51301	Editorial Clerk/Assistant
51302	Stu Trainee (Tech Editor)
51401	Statistical Clerk/Assis.
51501	Office Draftsman
51502	Stu Trainee (Visual Info)
51503	Stu Trainee (Info & Arts)
51601	Computer Clerk/Assist
51602	Stu Trainee (Com/Systems)
51701	Archivist Aid/Technician
51801	Student Management Aid
51901	Medical Record Technician
51902	Stu Trainee (Investigation)
51903	Stu Trainee (Supply)
51904	Stu Trainee (Transportn)
51905	Stu Trainee (Pers Mgmt)
52001	Secretary - General
52002	Secretary - Stenography
52003	Secretary - Typing
52004	Secretary – Dict. Mach. Tran
52005	Secretary (Sten/Ofc Auto)
52006	Secretary – (Ofc Auto)
5210	



52101	Stenographic Unit. Super.
52201	Clerk – Stenographer
52202	Stu Trainee (Clerk – Steno)
52301	Typing Unit Supervisor
52401	Clerk – Typist
52501	Closed Microphone Report
52601	Office Automation Clerk
52602	Office Automation Asst
52701	Information Clerk
53101	Equipment Operator
53201	Elec Accounting Mach Oper
53202	Elec Accounting Mach Sup
53301	Eam Proj Planner/Super
53302	Eam Program Supervisor
53401	Computer Operator
53501	Peripheral Equip Operator
53601	Card Punch Operator
54001	Telephone Operator
54101	Teletypist
54201	Crypt Equip Operator
54301	Communications Equip Oper
54401	Communications Clerk
55001	Office Services Man/Super
55101	Mgmt Clerical & Assistance
55102	Student Trainee Management
56000	Financial Clerical & Asst
56001	Accounting Clerk/Assist
56002	Budget & Account Tech
56003	Budget Clerk/Assistant
56004	Student Trainee (Budget)
56006	Stu Trainee (Fin Mgmt)
56101	Accounts Maint Clerk
56201	Accounting Technician
56301	Teller
56401	Voucher Examiner
56501	Payroll
56701	Accounting Student Train



57001	Purchasing Agent
57002	Procurement Clerk
57003	Stu Trainee (Procurement)
57004	Stu Trainee (Bus & Indus)
57501	Supply Clerical & Tech
57601	Propty Dpsl Cercl Tech
57602	Stu Trainee (Equipment)
57603	Stu Trainee (Facil Mgmt)
58001	Freight Rate Cl Asst/Tech
58101	Travel Clerk/Assistant
58201	Shipment Clerk/Assistant
58301	Cargo Scheduler
58401	Motor Vehicle Dispatcher
58501	Transportation Clerk Asst
59101	Legal Clerk & Techn Ser
59102	Stu Trainee (Legal)
59103	Stu Trainee (Copyrt & Pat)
59501	Library Aid/Tech
59601	Stu Train (Tec Inf/Com SC)
59602	Stu Trainee (Libr & Archv)
60001	Pending Classification
60101	Administrative Management
60102	Administrative Officer
60103	Administrative Operations
60104	Manpwr & Org Officer
60105	Program Management
60106	Support Services Admin
60107	Program Support Analyst
60201	Program Analysis
60201	Program Analysis
60301	Management Analysis
60302	Mgmt & Program Analysis
60401	Project Anal & Control
60501	Computer System Analyst
60502	Computer Programmer
60503	Computer Programr Analyst
60504	Computer Systems Progrmer



60505	Computer Equipment Analyst
60506	Computer Specialist
60601	Resources Mgmt Spec/Off.
61001	Contract Program Admin
61002	Contract Negotiation
61003	Contract Administration
61004	Contract Operations
61005	Contract Pricing Analysis
61006	Contract Termination
61101	Procurement Mgmt General
61102	Procurement Operations
61103	Procurement Analysis
61401	Supply Program Management
61402	Supply Operations
61403	Inventory Management
61404	Distrib Facil – Storage Mgmt
61405	Supply Cataloger
61501	Industrial Property Admin
61601	Property Disposal
61602	Property Utilization
61603	Property Marketing
61701	Realty
61901	General Transportation
61902	Traffic Management
61903	Transportation Operations
62000	Resources Control Spec
62001	Financial Program Mgmt
62101	Financial Operations
62102	Financial Systems
62201	Audit Management
62301	Budget Management
62401	Budget and Accounting
62501	General Accounting
63001	Personnel Program Admin
63002	Personnel Mgmt & Ops.
63101	Pers Staffing – Recruitment
63102	Personnel Staffing
63103	



63103	Pers Staffing – Examining
63201	Position Classification
63301	Employee Development
63401	Labor Relations Spec
63501	Employee Relations
63601	Equal Employment Spec/Mgr
64001	Public Affairs Program Mgmt
64101	Public Affairs Specialist
64301	Protocol
64302	Protocol Officer
65001	Tech Writing & Editing
65101	Writing and Editing
65201	Librarian
65301	Tech Information Services
65401	Technical Lit Translation
66001	Attorney
66002	Law Clerk
66101	Legislative Affairs
66201	Patent Attorney
66301	Patent Adviser
66401	Paralegal Specialist Ser
66601	General Educ & Training
66602	Education Specialist
66701	Training Instruction
67001	Gen Arts & Information
67101	Exhibits Specialist
67201	Visual Information
67301	Audio Visual Production
67501	Security Program Admin
67502	Personnel Security
67503	Physical Security
67504	Industrail Security
67505	Security Ops – General
67601	General Investigation
67602	Criminal Investigation
68001	Gen Business & Industry
68101	Industrial Specialist



68201	Contractor Indus Relatns
69500	Expert
69600	Consultant
69801	Archivist
69802	Recreation Specialist
69803	Foreign Affairs
69804	Manpower Development
69901	International Relations
69902	History
69903	Economics
69904	Communications Management
69905	Safety Management
69906	Printing Management
69907	Aircraft Operations
69908	Community Rel Specialist
69909	Mgmt Intern
69910	Fed Personnel Intern
69911	Logistics Mgmt Specialist
69912	Presidential Mgmt Intern
69999	Graduate Cooperative Stu
70001	Pending Classification
70009	Pending Classification
70090	Pending Classification
70091	Pending Classification
70092	Pending Classification
70093	Pending Classification
70094	Pending Classification
70095	Pending Classification
70096	Pending Classification
70097	Pending Classification
70098	Pending Classification
70099	Pending Classification
70100	Space Sciences
70101	Space Sciences
70103	Ast – Space Sciences
70105	Atmospheres & Ionospheres
70109	Space Sciences
70110	



70110	Ionospheres
70115	Fields and Particles
70120	Stellar Studies
70125	Planetary Studies
70126	Ast – Lunar & Planetary Stu
70130	Meteoroid Studies
70135	Solar Studies
70154	Geological Utilization
70155	Oceanographic Utilization
70180	Space Sciences Prog Mgt
70181	Aeronomy Program Mgt
70182	Fields & Particles Prog Mgt
70183	Stellar Studies Prog Mgt
70184	Lun & Plan Stud Prog Mgt
70185	Solar Studies Program
70190	Pending Classification
70191	Pending Classification
70192	Pending Classification
70193	Pending Classification
70194	Pending Classification
70195	Pending Classification
70196	Pending Classification
70197	Pending Classification
70198	Pending Classification
70199	Pending Classification
70200	Applications Sciences
70202	Earth Sciences Remote Sens
70203	Applications Sciences
70204	Atmospheric Chem Dynamics
70205	Global Ecology Studies
70206	Atmospheric Measurement
70207	Applicat/Data Management
70208	Science Missions
70209	Application Sciences
70290	Pending Classification
70291	Pending Classification
70292	Pending Classification



70293	Pending Classification
70294	Pending Classification
70295	Pending Classification
70296	Pending Classification
70297	Pending Classification
70298	Pending Classification
70299	Pending Classification
70581	Ast – Life Scie Prog Mgmt
70620	Psychological Studies
70630	Plant Studies
70650	Molecular Biodynamics
70655	Radiobiological Studies
70860	Bionics Studies
70900	Life Sciences and Systems
70901	Life Sciences and Systems
70909	Life Sciences and Systems
70910	Life Environmental Studies
70911	Life Sciences Pro. Mgmt
70921	Biochemical Processes
70922	Physiological Studies
70923	Neurobiological Studies
70931	Chem & Biological Evolution
70932	Biological Adaptation
70933	Solar System Analysis
70941	Environmental Physiology
70942	Human Performamnce Studies
70943	Medical Studies
70944	Environmental Control
70945	Manned Systems
70990	Pending Classification
70991	Pending Classification
70992	Pending Classification
70993	Pending Classification
70994	Pending Classification
70995	Pending Classification
70996	Pending Classification
70997	Pending Classification



70998	Pending Classification
70999	Pending Classification
71000	Fluid & Flight Mechanics
71001	Fluid & Flight Mechanics
71002	Aerothermodynamics
71009	Fluid & Flight Mechanics
71010	A/SP Veh Desgn/Mssn Analy
71015	Navig/Guid/Control Systems
71030	Fluid Mechanics
71035	Magnetofluid Dynamics
71040	Aerostructural Dynamics
71045	Flight Vehicle Acoustics
71055	Heat Transfer
71060	Stability, Cntrl & Perform
71065	Flight Veh. Atmos. Envir
71068	Basic Properties of Gases
71069	Ast – Basic Props of Gases
71080	Fluid & Flight Mech Pro. Man
71090	Pending Classification
71091	Pending Classification
71092	Pending Classification
71093	Pending Classification
71094	Pending Classification
71095	Pending Classification
71096	Pending Classification
71097	Pending Classification
71098	Pending Classification
71099	Pending Classification
71500	Materials & Structures
71501	Materials & Structures
71502	Structural Dynamics
71503	Mechanics of Materials
71509	Materials and Structures
71510	Materials
71515	Structural Materials
71517	Aerosp Matallic Materials
71520	Basic Props of Materials



71525	Aerosp Polymeric Material
71535	Aerosp Ceramic Materials
71540	Friction & Lubrication
71550	Structural Mechanics
71555	Flight Structures
71580	Mats & Strucs Prog Manage
71590	Pending Classification
71591	Pending Classification
71592	Pending Classification
71593	Pending Classification
71594	Pending Classification
71595	Pending Classification
71596	Pending Classification
71597	Pending Classification
71598	Pending Classification
71599	Pending Classification
72000	Propulsion Systems
72001	Propulsion Systems
72002	Electric Propulsion Systm
72003	Electrical Power Systems
72004	Airbreath Propulsion Syst
72005	Liquid Propulsion Systems
72006	Mechanical Components
72009	Propulsion and Power
72010	Solid Propulsion Systems
72020	Electrical Prop. & Power
72025	Direct Energy Conversion
72040	Nuclear Energy Processes
72050	Fuels/Combustion Processes
72060	Propulsion Flow Dynamics
72070	Prop. Sys. Proj. Management
72080	Prop. Program Management
72081	Nuclear Prop Prog Mgmt
72082	Liq. Prop. Prog. Management
72083	Elec Prop & Pwr Prog Mgmt
72084	Solid Prop. Prog. Mgmt
72085	Ast – Nucl Prop Pgm Mgmt



72086	Ast - Elec Prop Pwr Pgm Mgt
72087	Ast– Elec Prop Pwr Pgm Mgt
72090	Pending Classification
72091	Pending Classification
72092	Pending Classification
72093	Pending Classification
72094	Pending Classification
72095	Pending Classification
72096	Pending Classification
72097	Pending Classification
72098	Pending Classification
72099	Pending Classification
72500	Flight Systems
72501	Flight Systems
72502	Ast – Flight Systems
72504	Reliability & Qual Assur
72505	Reliability
72509	Flight Systems
72510	Flight Systems Test
72511	Ast Flt Systems Safety
72512	Aerospace Flight System
72513	Flight System Design
72515	Electronic Syst Fail Anal
72516	Crew Station Systems
72517	Environ Control Systems
72520	Experimental Mfg Techs
72522	Quality Assurance
72530	Electrical Systems
72535	Manned Space Flt Systems
72536	Ast – Manned Space Flt Syst
72537	Aeronautical Flt Research
72570	Space Vehicle Proj Mang
72571	Spacecraft Proj Management
72572	Launch Vehicle Proj. Mgmt
72573	Aeron Flt Rsh Proj Mgmt
72580	Flight Systems Prog Mgmt
72581	Spacecraft Program Mgmt



72582	Launch Vehicle Prog Mgmt
72583	Ast – Launch Veh Prog Mgmt
72585	Flt Systems Test Prog Mgmt
72586	Reliability Program Mgmt
72587	Qual Assurance Prog Mgmt
72588	Ast – Flight Sys Prog Mgmt
72589	Ast – Spacecraft Prog Mgmt
72590	Pending Classification
72591	Pending Classification
72592	Pending Classification
72593	Pending Classification
72594	Pending Classification
72595	Pending Classification
72596	Pending Classification
72597	Pending Classification
72598	Pending Classification
72599	Pending Classification
73000	Meas & Instrumentation Sys
73001	Meas & Instrumentation Sys
73002	Ast – Measmt & Instrmntn Sys
73005	Sensors & Transducers
73009	Measurement & Instrum
73010	Electronic Instrmntn System
73015	Optical Physics
73016	Electro – Optical Sensor Sys
73017	Fluid State Devices
73020	Meas Standards & Calibr
73025	Control Systems
73026	Guidance/Navigation System
73037	Tracking & Tele Systems
73040	Electromagnetic Systems
73043	Tracking Systems
73045	Telemetry Systems
73055	Telecommunications
73057	Electronics of Materials
73065	Microwave Phy Electronics
73080	Meas & Instr Sys Prog Mgt



73081	Tele Sys Prog Management
73082	Telecom. Program Mgmt
73083	Ast – Meas & Intr Prog Mgmt
73090	Pending Classification
73091	Pending Classification
73092	Pending Classification
73093	Pending Classification
73094	Pending Classification
73095	Pending Classification
73096	Pending Classification
73097	Pending Classification
73098	Pending Classification
73099	Pending Classification
73500	Data Systems
73501	Data Systems
73502	Data Systems
73503	Software Systems
73504	Modeling
73505	Data Analysis
73506	Data Systems Analysis
73507	Flight Data Systems
73507	Flight Data Systems
73508	Ground Data Systems
73508	Ground Data Systems
73509	Data Systems
73510	Theoretical Simulation Tech
73511	Flight Software Systems
73512	Ground Software Systems
73513	Hardware Systems
73514	Flight Hardware Systems
73515	Ground Hardware Systems
73516	Computer Res/Development
73580	Data Systems Program Mgmt
73590	Pending Classification
73591	Pending Classification
73592	Pending Classification
73593	Pending Classification
73594	



73594	Pending Classification
73595	Pending Classification
73596	Pending Classification
73597	Pending Classification
73598	Pending Classification
73599	Pending Classification
74000	Facilities & Operations
74001	Exper Facils. & Equip.
74002	Exper/Facilities Develop
74003	Facility Systems Safety
74005	Launch & Flight Opers
74006	Flight Mission Operations
74009	Facilities and Operations
74010	Mech – Experimental Equipmt
74015	Gas and Fluid Systems
74020	Electrical Exper Equip
74025	Exper Facility Techniques
74040	Nuclear Exper Techniques
74080	Exper Fac & Equip Prog Mgt
74081	Launch & Flt Op Prog Mgmt
74082	Ast – Exp Fac: EQ Pgm Mgt
74083	Ast – Launch & Flt Prog Mgt
74090	Pending Classification
74091	Pending Classification
74092	Pending Classification
74093	Pending Classification
74094	Pending Classification
74095	Pending Classification
74096	Pending Classification
74097	Pending Classification
74098	Pending Classification
74099	Pending Classification
74501	Research Piloting
74502	Flight Training
74503	Flight System Operations
74504	Mission Support Requirement
74505	Mission Operations Integr



74506	Flight Activity Planning
74507	Mission Specialist Astron
74508	Pilot Astronaut
74509	Operations
74510	Research Piloting
74511	Launch/Flight Operations
74512	Aircraft Mission Operat
74590	Pending Classification
74591	
77000	Management
77001	Executive Management
77002	Ast – Executive Management
77003	Ast – Executive Management
77009	Pending Classification
77010	Project Management
77011	Ast – Project Management
77012	Ast – Project Management
77030	Technical Management
77031	Tech Management Systems
77032	Tech Resources Management
77033	Phys Sci Tech Resource Mgmt
77034	Tech Eng Operations Mgmt
77035	Ast – Technical Management
77036	Life Science Tech/Res Mgmt
77040	Technology Utilization
77041	Technology Utilization
77055	Tracking Station Mgmt
77056	Launchsite Support Mgmt
77060	Program Management
77061	Program Management
77062	Space Science Program Mgmt
77063	Earth Science Program Mgmt
77064	Life Science Program Mgmt
77065	Fluid/Flight Mech Prog Mgmt
77066	Material/Structure Prog Mgmt
77067	Propulsion Program Mgmt
77068	Flight System Prog Mgmt



77069	Measurmt/Instrumtn Pr Mgmt
77070	Data System Program Mgmt
77071	Facilities Program Mgmt
77072	Telecommunications Pr Mgmt
77073	Adv Technology Prog Mgmt
77074	Adv Technology Prog Mgmt
77080	Program Management
77081	Ast – Program Management
77082	Ast – Program Management
77083	Ast – Program Management
77085	Res Grants & Cont Pgm Mgmt
77086	Ast – Res Grnt: Cntr Prg Mgt
77088	Adv Technology Prog Mgmt
77089	Ast – Adv Tech Prog Mgmt
77090	Management
77091	Pending Classification
77092	Pending Classification
77093	Pending Classification
77094	Pending Classification
77095	Pending Classification
77096	Pending Classification
77097	Pending Classification
77098	Pending Classification
77099	Pending Classification
79500	Expert
79600	Consultant
79999	Graduate Cooperative Stu
90001	Pending Classification
90101	Med Off – Aviation Medicine
90102	Med Off – Occupational Med
90103	Medical Officer – Other
90501	Psychologist
90601	Biologist
90602	Microbiologist
90701	Physiologist
90801	Nurse
90901	Medical Technologist



91001	Veterinarian
91101	Industrial Hygienist
91201	Zoologist
91301	Botanist
91401	Health Science
99500	Expert
99600	Consultant
99999	Graduate Cooperative Stu

7. Pay Plan/Grade

Source: The CPDF Guide to Personnel Data Standards, <http://www.opm.gov/feddata/guidance.asp>

8. Supervisory Status

Source: The CPDF Guide to Personnel Data Standards, <http://www.opm.gov/feddata/guidance.asp>

9. Position Type

Source: FPPS Work Schedule Table

10. Sex

Source: The CPDF Guide to Personnel Data Standards, <http://www.opm.gov/feddata/guidance.asp>

11. Birth Date

Source: The CPDF Guide to Personnel Data Standards, <http://www.opm.gov/feddata/guidance.asp>

12. Mail-Code

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
Center Specific	Center Acronym followed by Organization Code	

13. NASA Class Block Code

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
1	WAGE GRADE	
2	NON AST SCIENTISTS AND ENGINEERS	
3	TECHNICIANS	
5	CLERICAL	
6	PROFESSIONAL ADMINISTRATIVE	
7	AST SCIENTISTS AND ENGINEERS	
9	MEDICAL	

14. Degree Level

Source: The CPDF Guide to Personnel Data Standards, <http://www.opm.gov/feddata/guidance.asp>

15. Supervisory Level Code

Source: FPPS

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
1	ADMINISTRATOR	
2	DEPUTY ADMINISTRATOR	
3	ASSOCIATE ADMINISTRATOR	
4	ASSOCIATE DEPUTY ADMINISTRATOR	
5	EXECUTIVE OFFICER	
6	CHIEF SCIENTIST	
7	CHIEF ENGINEER	
8	CHIEF TECHNOLOGIST	
9	CHIEF OF STAFF	
10	CHIEF FINANCIAL OFFICER	
11	CENTER DIRECTOR	
12	CENTER DEPUTY DIRECTOR	
13	CENTER ASSOCIATE DIRECTOR	
14	CENTER ASSISTANT DIRECTOR	
15	CHIEF, CENTER STAFF OFFICE	
16	DEPUTY CHIEF, CENTER STAFF OFFICE	
17	SPECIAL ASSISTANT TO CENTER DIRECTOR	
18	SENIOR SCIENTIST	
19	CHIEF ENGINEER	
20	PROGRAM MANAGER (AGENCY)	
21	ORGANIZATION DIRECTOR	
22	ORGANIZATION DEPUTY DIRECTOR	
23	ORGANIZATION ASSOCIATE DIRECTOR	
24	ORGANIZATION ASSISTANT DIRECTOR	
25	MID-MANAGERS-MANAGER	
26	DIVISION OR OFFICE CHIEF	
27	DEPUTY DIVISION OR DEPUTY OFFICE CHIEF	
28	ASSOCIATE/ASSISTANT DIVISION OR OFFICE CHIEF	
29	BRANCH OR OFFICE CHIEF	
30	DEPUTY BRANCH CHIEF OR DEPUTY OFFICE CHIEF	
31	ASSOCIATE/ASSISTANT BRANCH OR OFFICE CHIEF	
32	SECTION HEAD/GROUP LEAD/TEAM LEAD	
33	ASST SECTN HEAD/ASST TEAM/GROUP LEAD	
34	ALL OTHER PAID CIVIL SERVICE	
35	INTERGOVERNMENTAL PERSONNEL ACT	
36	NON PAID OTHERS	
37	GRANTEES	
38	VOLUNTEERS	
39	MILITARY DETAILEES	

**16. Ethnicity/Race**

Note: The data standard is applicable to employment occurring on or after January 1, 2006, and is required for employment occurring on or after July 1, 2006. For employment occurring prior to July 1, 2006, the Ethnic Origin data standard may continue to be used.

Source: The CPDF Guide to Personnel Data Standards, <http://www.opm.gov/feddata/guidance.asp>

17. Supervisor Bypass Flag

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
N	NO	
Y	YES	Supervisor field will not be overwritten by FPPS if flag is set to Yes

18. Company Name

Source: NASA Enterprise Directory, <https://webdir.nasa.gov/>

19. Occupational Series Code

Source: <http://www.opm.gov/>

Series Range	Occupational Group
0000 - 0100	Miscellaneous Occupations
0100 - 0199	Social Science, Psychology, and Welfare
0200 - 0299	Human Resources Management
0300 - 0399	General Administrative, Clerical, and Office Services
0400 - 0499	Biological Sciences
0500 - 0599	Accounting and Budget
0600 - 0699	Medical, Hospital, Dental, and Public Health
0700 - 0799	Veterinary Medical Science
0800 - 0899	Engineering and Architecture
0900 - 0999	Legal and Kindred
1000 - 1099	Information and Arts
1100 - 1199	Business and Industry
1200 - 1299	Copyright, Patent, and Trade-Mark
1300 - 1399	Physical Sciences
1400 - 1499	Library and Archives
1500 - 1599	Mathematics and Statistics
1600 - 1699	Equipment, Facilities, and Service
1700 - 1799	Education
1800 - 1899	Inspection, Investigation, Enforcement, and Compliance
1900 - 1999	Quality Assurance, Inspection and Grading
2000 - 2099	Supply
2100 - 2199	Transportation
2200 - 2299	Information Technology Management

20. COTR

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
N	Not Certified	
N/A	Not Applicable	
Y	Certified	

21. Company Org Code

Source: NASA Enterprise Directory, <https://webdir.nasa.gov/>

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